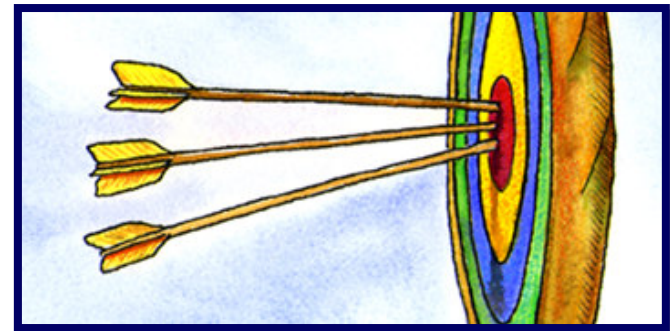


Welcome to...

Budget Formulation:

Project Planning

- At the end of this course, individuals should be able to use the Budget Formulation System to:
 - Distribute Project FTEs and Travel \$ from the Organizations and Project to the WBS elements
 - Request Project FTEs, Travel \$, Service Pools units, Other Direct \$ and WYEs
 - Phase all Project Planning elements
 - Access and manipulate the Project Planning reports



■ Business Context

- Overview of key business processes and related BF concepts

■ Demonstrations

- Trainer-led examples of key BF activities

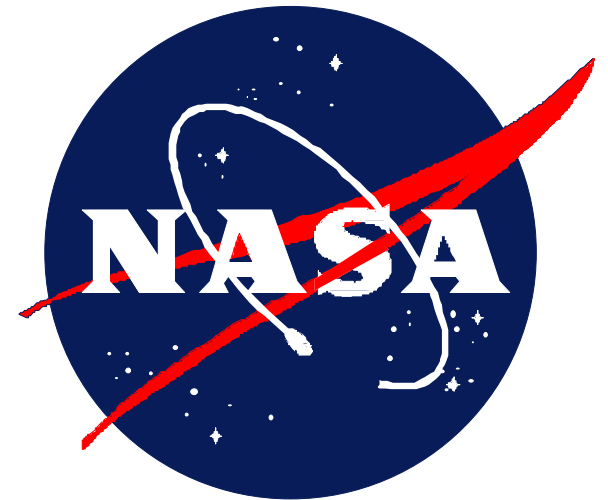
■ Participant Exercises

- Completing real-life business tasks using the BF system

■ Training Course Feedback

- Assessment of course effectiveness using the End-User Evaluation Form

Project Planning Role Overview and Business Process Overview



■ The roles in the class and how they differ

■ Project Planning Authorizer

- Distributes the Project Definitions' FTE & Travel \$ allocations from Organization & Project Definition to Project WBS elements
- Has access to the following Planning Folders:
 - Project – Secondary FTE Distribution
 - Project – Secondary Travel Dollar Distribution



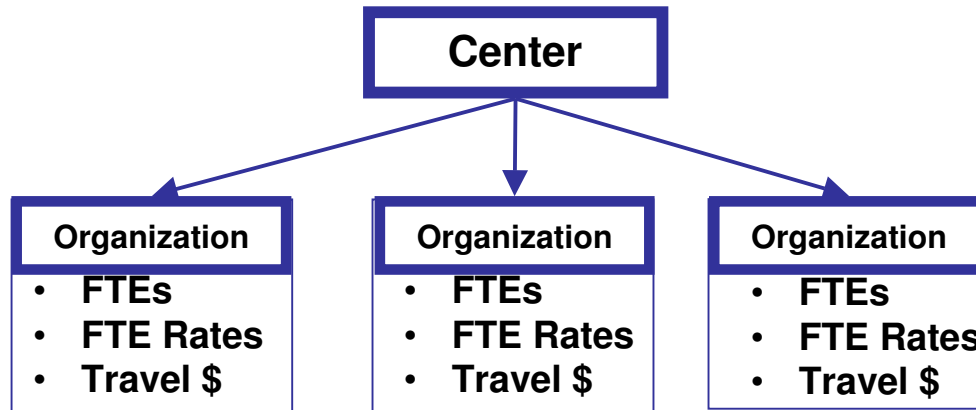
■ Project Planning Requester

- Requests FTEs, Travel \$, Service Pool units, Other Direct \$, and WYEs for the WBS element level of planning.
- Has access to the following Planning Folders:
 - Project Plan (FTE, Travel, SP, Other Direct\$, WYE)
 - PP – Phasing (Other Direct \$)

Visualizing the system


Center Control FTE & Travel Dist.

Center Control Planning



Planning Folders

- Center Control Planning (FTEs / R&PM)
- Center Control Planning (Travel \$)
- Primary Resource Dist. (FTEs)

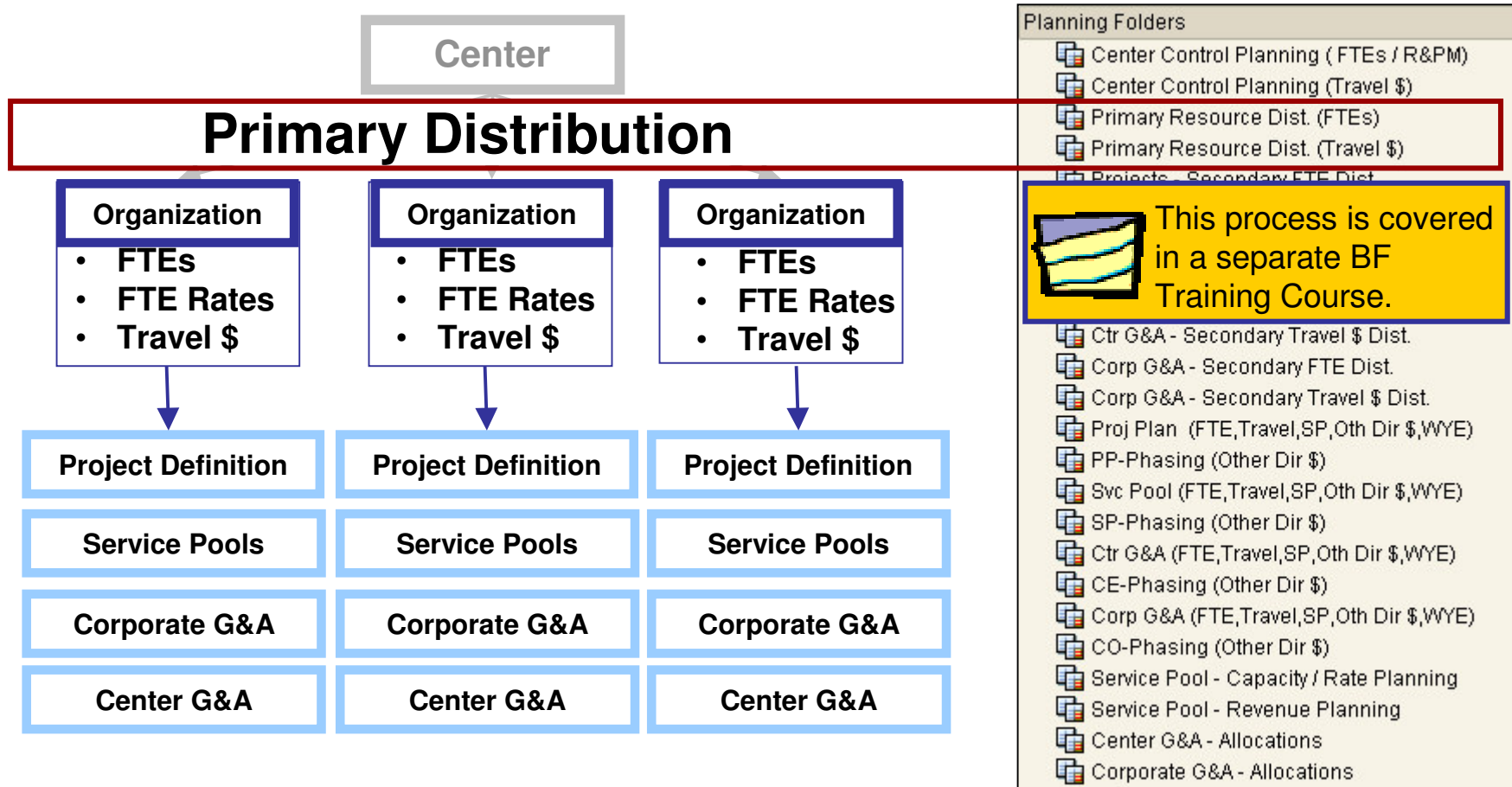
 This process is covered in a separate BF Training Course.

- Service Pools - Secondary Travel \$ Dist.
- Ctr G&A - Secondary FTE Dist.
- Ctr G&A - Secondary Travel \$ Dist.
- Corp G&A - Secondary FTE Dist.
- Corp G&A - Secondary Travel \$ Dist.
- Proj Plan (FTE,Travel,SP,Oth Dir \$,WYE)
- PP-Phasing (Other Dir \$)
- Svc Pool (FTE,Travel,SP,Oth Dir \$,WYE)
- SP-Phasing (Other Dir \$)
- Ctr G&A (FTE,Travel,SP,Oth Dir \$,WYE)
- CE-Phasing (Other Dir \$)
- Corp G&A (FTE,Travel,SP,Oth Dir \$,WYE)
- CO-Phasing (Other Dir \$)
- Service Pool - Capacity / Rate Planning
- Service Pool - Revenue Planning
- Center G&A - Allocations
- Corporate G&A - Allocations

- These folders are used by the Center FTE & Travel Authorizers in the CFO's office to distribute FTE & Travel allocations to the Organizations

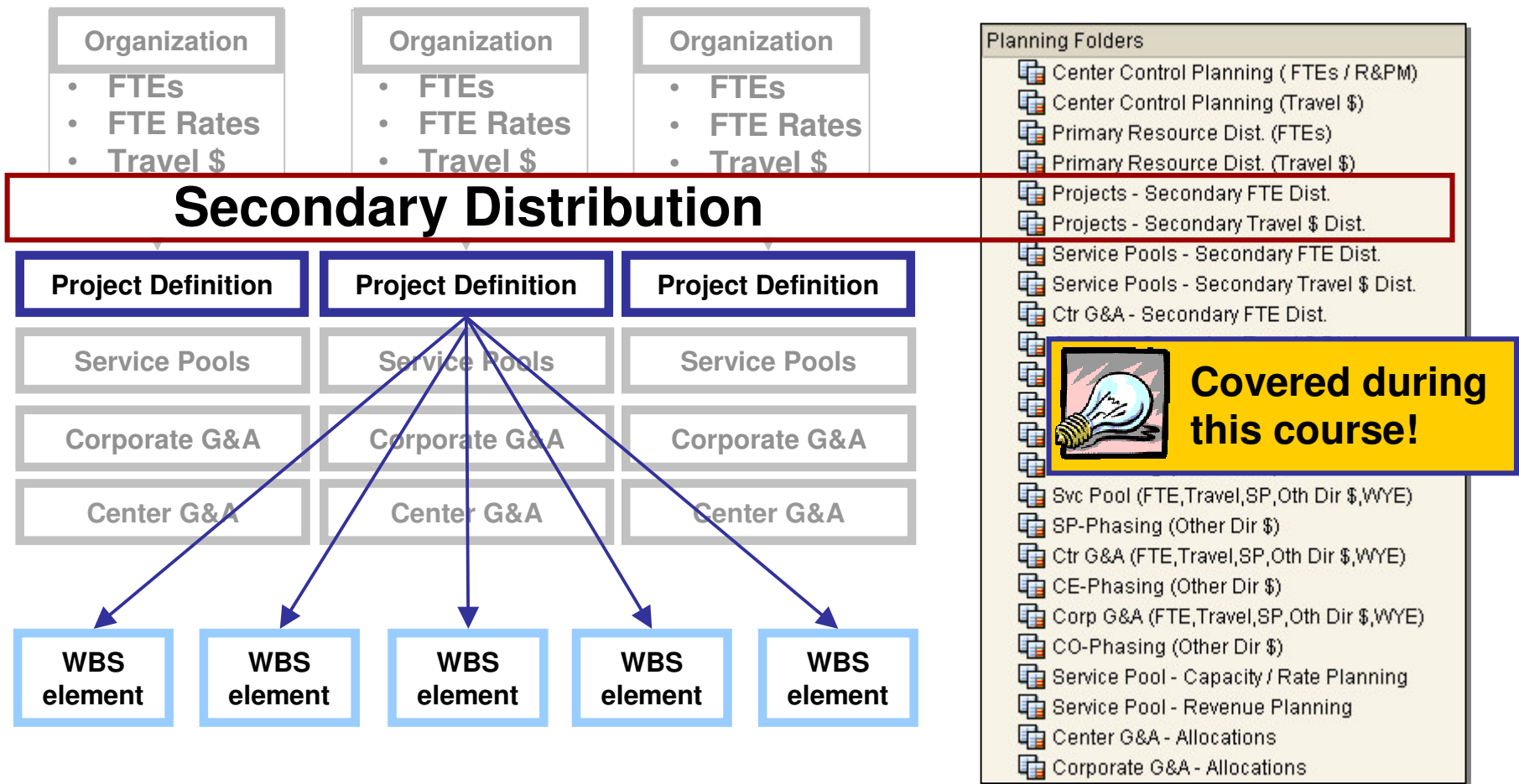


Visualizing the system Primary FTE & Travel Dist.



- These folders are used by the Center Organizational FTE & Travel Authorizers in the Primary Resource Distribution to allocate FTEs & Travel \$ throughout the Organizations by the full cost components: Projects/Programs, Center G&A, Corp. G&A, & Service Pool

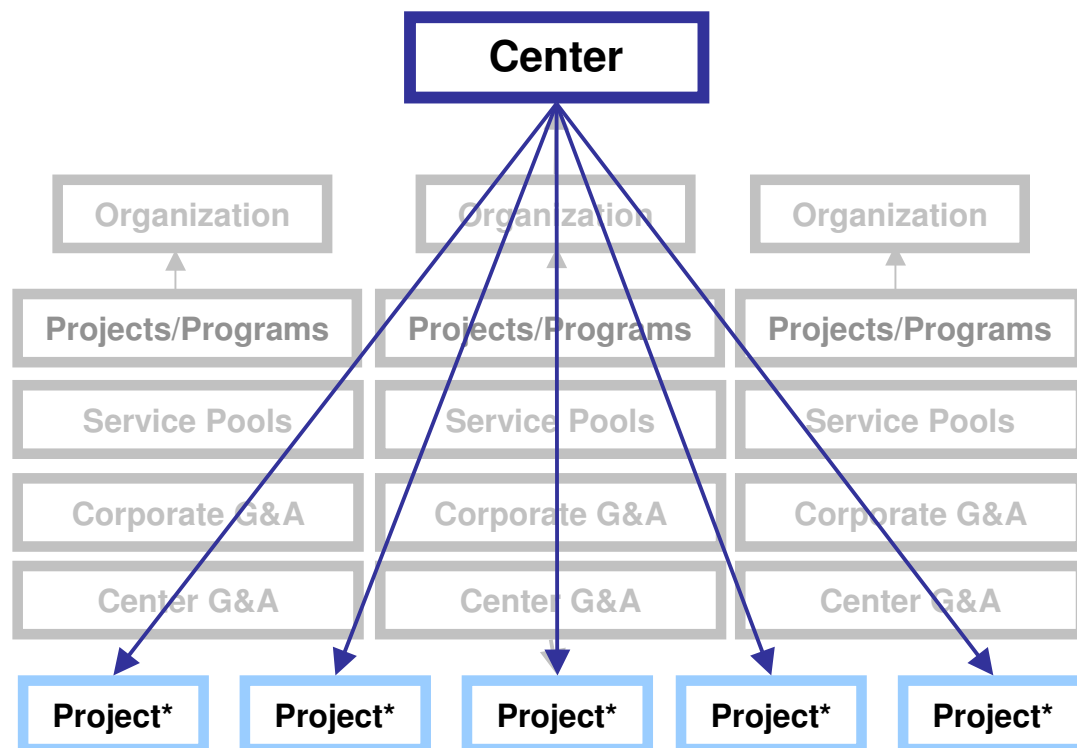
Visualizing the system Secondary FTE & Travel Dist.



- These folders are used by the Project Planning Authorizer in the Secondary Resource Distribution to allocate FTEs & Travel \$ from the Project Definition to the Projects' WBS elements



Visualizing the system Center G&A Allocation



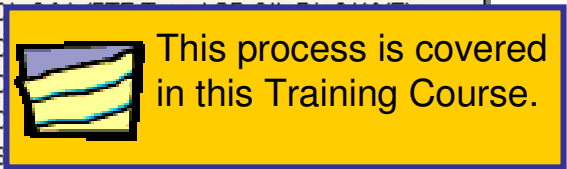
*Center G&A will be allocated to the level at which WF was planned

Center G&A Allocations

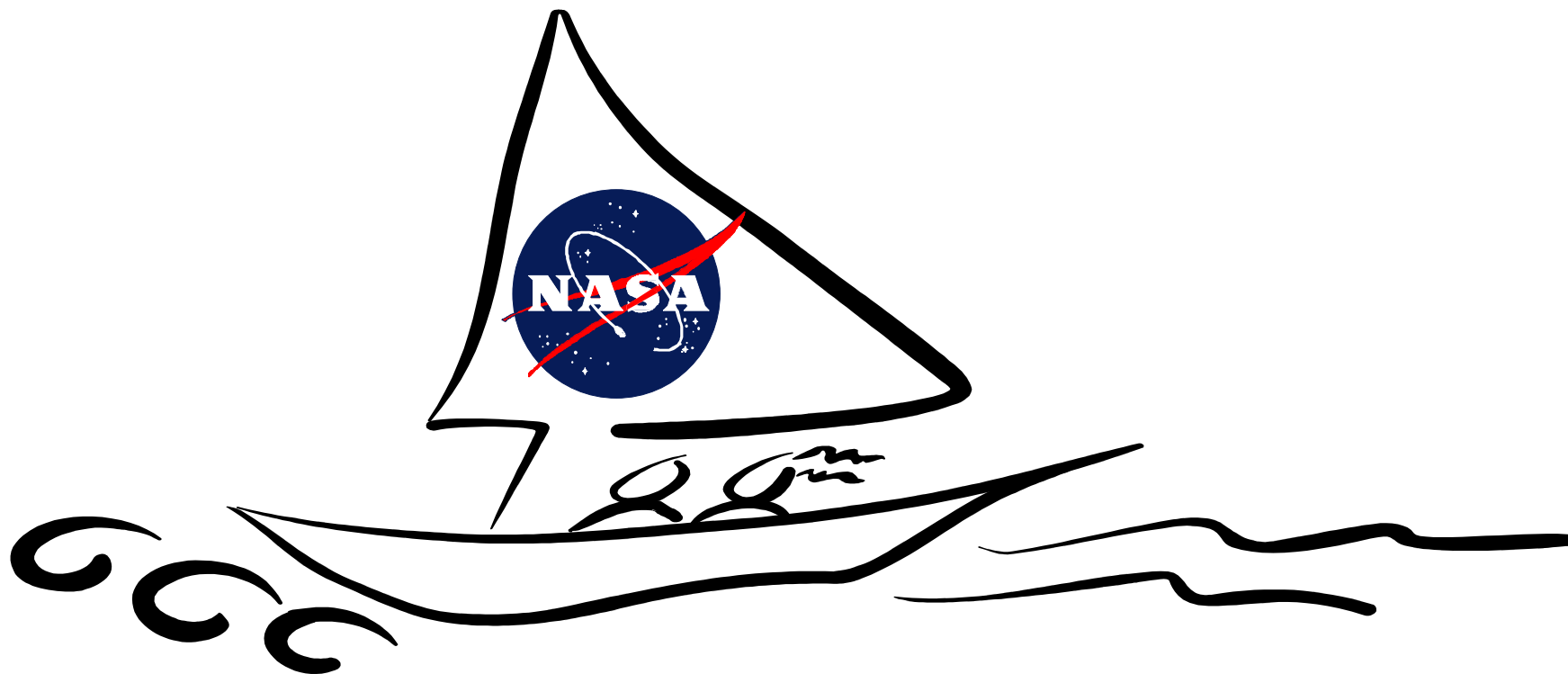
- This folder is used by the Center CFO to perform Center G&A allocations back to Projects as an additional component of the Full Cost Budget from the Projects/Programs point of view

Planning Folders

- Center Control Planning (FTEs / R&PM)
- Center Control Planning (Travel \$)
- Primary Resource Dist. (FTEs)
- Primary Resource Dist. (Travel \$)
- Projects - Secondary FTE Dist.
- Projects - Secondary Travel \$ Dist.
- Service Pools - Secondary FTE Dist.
- Service Pools - Secondary Travel \$ Dist.
- Ctr G&A - Secondary FTE Dist.
- Ctr G&A - Secondary Travel \$ Dist.
- Corp G&A - Secondary FTE Dist.
- Corp G&A - Secondary Travel \$ Dist.
- Proj Plan (FTE,Travel,SP,Oth Dir \$,WYE)
- PP-Phasing (Other Dir \$)
- Svc Pool (FTE,Travel,SP,Oth Dir \$,WYE)
- SP-Phasing (Other Dir \$)
- Service Pool - Revenue Planning
- Center G&A - Allocations
- Corporate G&A - Allocations



Navigation Basics Demonstration





What Are the Primary Sections of a Typical Screen?

Planning Folder Edit Goto System Help

Execute Primary Resource Dist. (FTEs)

Name Descriptn Selection Char. value ext. Selection CharVal...

Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2005	2005		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Organization	NASA Org	21SF	Space Projects Divisi...		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2003	2003		

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules

Projects (Annual) Projects (Annual) - Delta Svc Pools (Annual) Svc Pools (Annual) - Delta Ctr G&A (Annual) Ctr G&A (Annual) - Delta Corp G&A (Annual)

Refresh FTE Rate Check Bus. Rules Recompute

Guide Type	OG Type	Project Definition		FY 2003 FTEs	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs
INGUIDE	#	21-200-10	21-200-10	30.0	30.0	30.0	30.0	30.0	30.0	30.0
INGUIDE	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	30.0
Guide Type	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	30.0

Projects (Annual) \$ Svc Pools (Annual) \$ Ctr G&A (Annual) \$ Corp G&A (Annual) \$ Projects (Phase) \$ Svc Pools (Phase) \$ Ctr G&A (Phase) \$ Corp G

Guide Type	OG Type	Project Definition		FY 2003 \$	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$
INGUIDE	#	21-200-10	21-200-10	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	4,702.770
INGUIDE	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	4,702.770
Guide Type	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	4,702.770

Header Area

Input Area

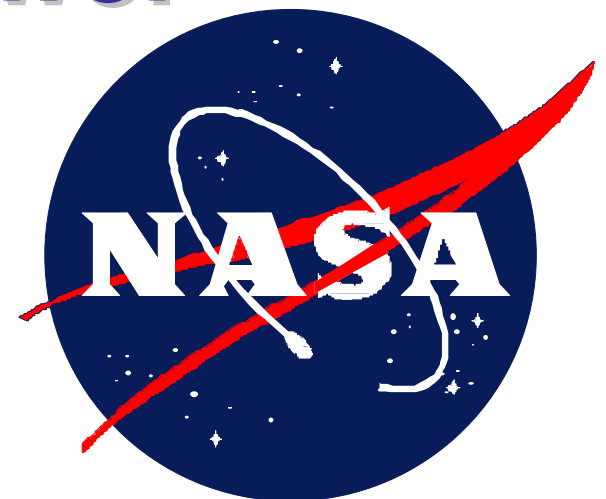
Output Area

■ Screens have three primary areas:

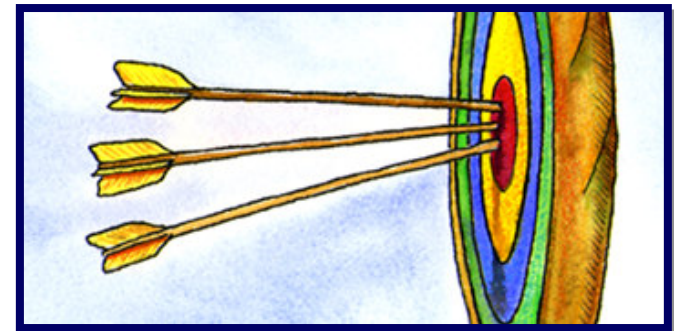
- Header area
- Input Area
- Output Area

Welcome to Budget Formulation

BW Report Viewer Overview

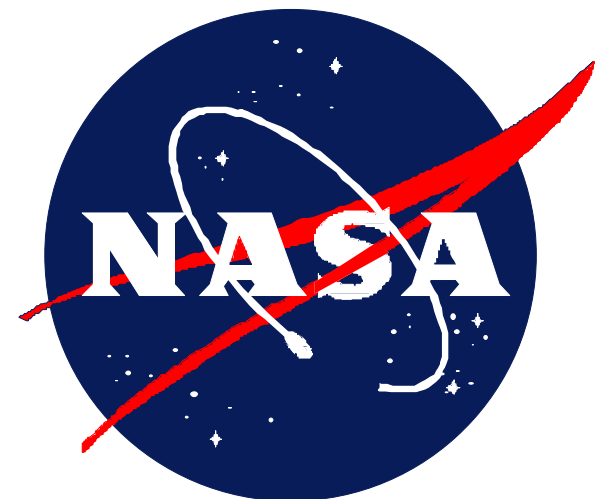


- At the end of this course, individuals should be able to
 - Log into the Budget Formulation BW Reports website.
 - Define report parameters
 - Run Budget Formulation BW Reports
 - Manipulate report
 - Print reports



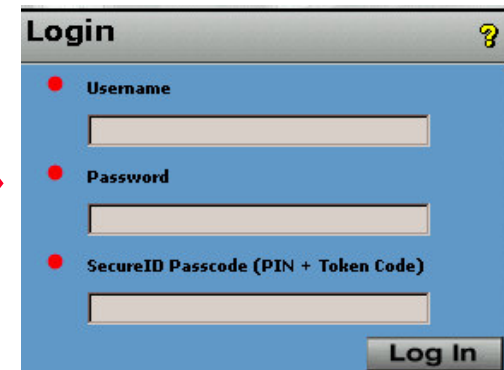
Topic 1

Logging In

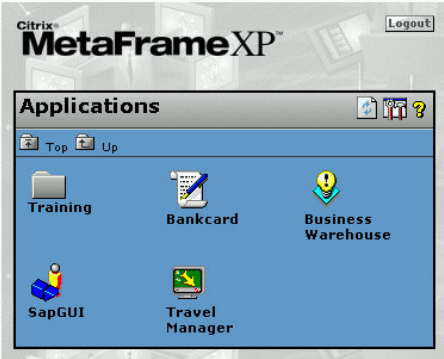


- Mac Users
- Logon to NISSU / Citrix
 - URL
 - <https://utility.nasa.gov>

NISSU Logon



NISSU Application Options



Welcome to the NASA Services Citrix Server Farm

MetaFrame XP Applications

Welcome to your personalized view of MetaFrame XP applications. The Applications box contains icons for the applications that you can use. Click an icon to launch an application. Click Refresh to view the latest applications. Click Settings to change your settings. Click a folder icon to display its contents. If you have problems using an application, please contact the IMCC at 1-866-986-4778 for more information.

MetaFrame XP Message Center

The MetaFrame XP Message Center displays any informational or error messages that may occur.

This Is a U.S. Government Computer
 This system is for the use of authorized users only.
 By accessing and using the computer system you are consenting to system monitoring, including the monitoring of keystrokes. Unauthorized use of, or access to, this computer system may subject you to disciplinary action and criminal prosecution.

■ PC Users

- Go To IE
- URL:
 - <https://access.ifmp.nasa.gov>
- Choose Budget Formulation



Integrated Financial Management Program
IFMP Production Systems
 for PC users

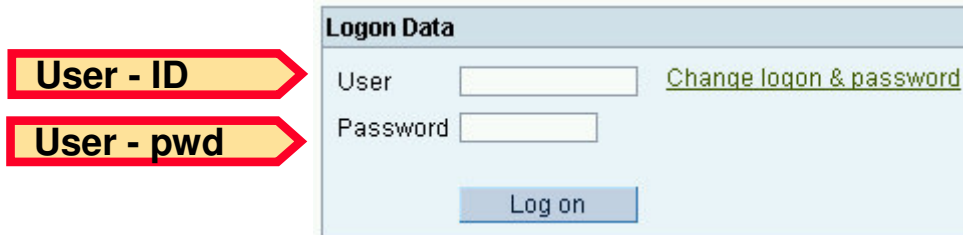
Internet Explorer 6.0 is required.

Applications	SAP Reference & Training
SAP R/3 Click to launch the web-based version of SAP R/3 - NASA's Core Financial Accounting System. (Users who have the SAP R/3 GUI installed on their desktop should use that application for enhanced functionality.)	On-line Quick Reference Click to launch the on-line reference guide for NASA's Core Financials. Includes SAP user procedures, a glossary, and job aids.
Bankcard Click to launch the web-based version of Bankcard - NASA's Credit Card and Receipts System.	Web-Based Training Click to launch the Core Financial Web-Based Training (WBT) courses. These courses focus on SAP procedures that describe the processes end-users need to complete tasks related to specific job roles.
Budget Formulation Click to launch the web-based reporting tool for Strategic Enterprise Management (SEM) - NASA's budget formulation application.	
Business Warehouse Click to launch the web-based version of Business Warehouse - NASA's Business Intelligence Tool (BI), which provides on-line analytical access to Core Financial information.	
Travel Manager Click to launch the web-based version of NASA's Travel Manager.	

NASA Official: Jonathan Pettus
 Web Services Provided by: IDS - CSC

Site Curator: Brent Copeland
[NASA Web Privacy Statement](#)

- You will be prompted to enter your User Name and Password
 - Enter your SEM User Name and Password

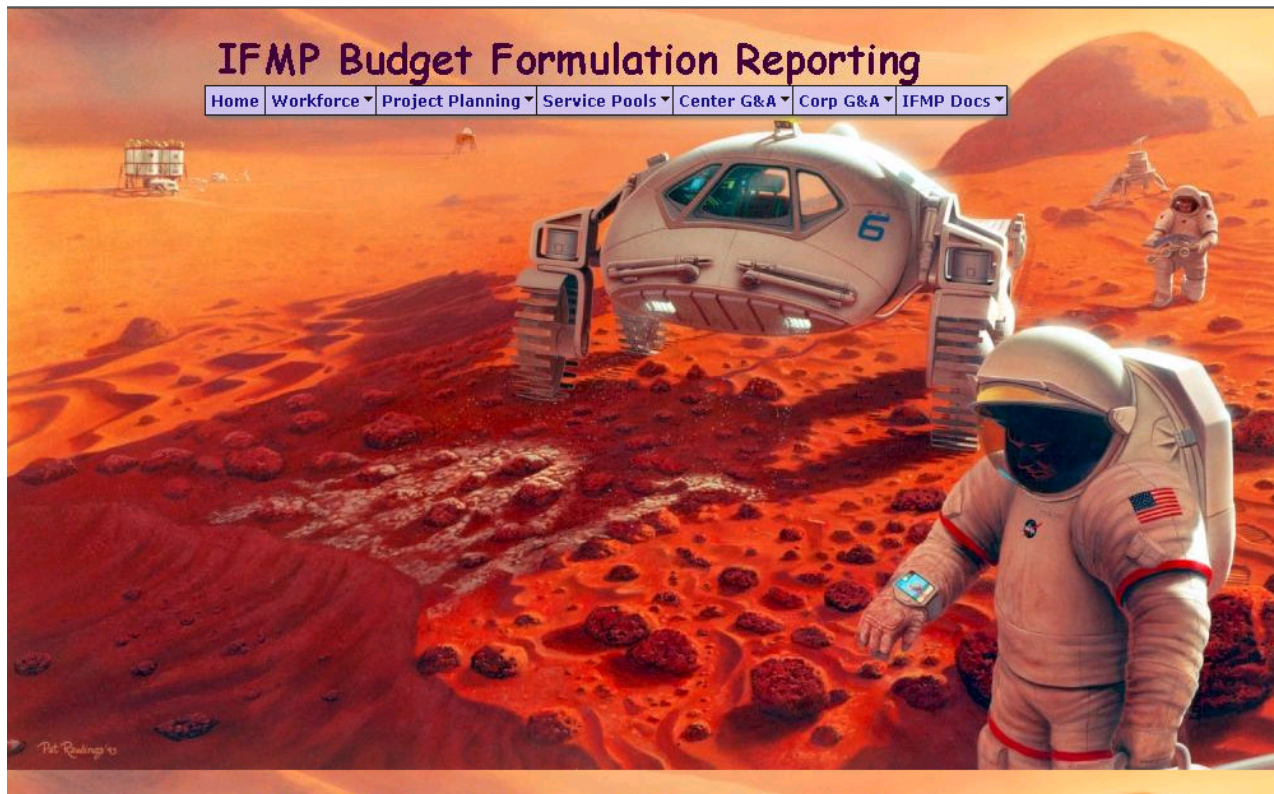
A screenshot of a web-based login form titled 'Logon Data'. To the left of the form, two yellow arrows with red outlines point towards the input fields: the top arrow is labeled 'User - ID' and points to the 'User' field; the bottom arrow is labeled 'User - pwd' and points to the 'Password' field. The form itself has a light blue background and contains the following elements: a title 'Logon Data' at the top; a 'User' label followed by a text input field and a green link 'Change logon & password'; a 'Password' label followed by a text input field; and a 'Log on' button at the bottom.

User - ID →

User - pwd →

Logon Data	
User	<input type="text"/> Change logon & password
Password	<input type="password"/>
<input type="button" value="Log on"/>	

■ Main Menu of Budget Formulation Reports Portal





Using the pull-down menus

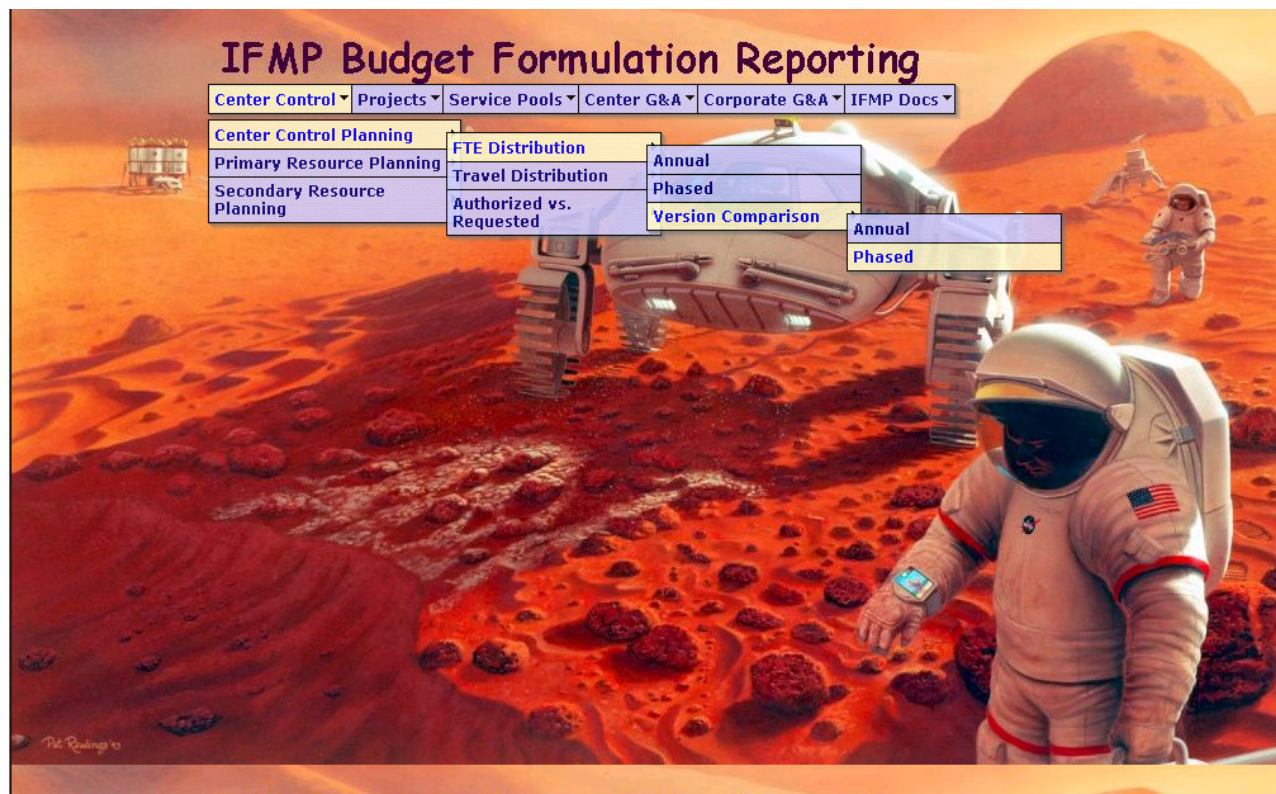
- **The lavender colored pull-down menus contain links to each of the reports in the system.**

Select a report by:

- **Hover over a top level menu item until it turns yellow**
- **Click the yellow menu item**
- **A sub-menu will appear**
- **Navigate through the sub-menu by hovering over the menu options**
- **Click on the menu item of the report that you wish to run**

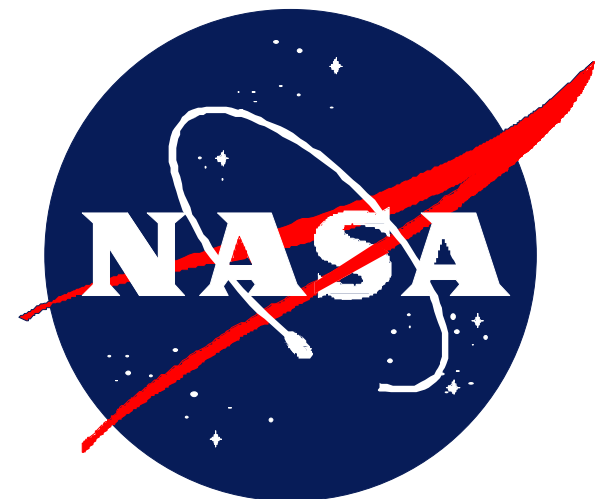
Using the pull-down menus

- Pull Down Menu 'sample'




Topic 3

Viewing Reports



- Once you have finished entering your variables and have clicked the “Execute” button, your report is displayed




BW

[Home](#)
[Workforce](#)
[Projects](#)
[Service Pools](#)
[Center G&A](#)
[Corporate G&A](#)
[IFMP Docs](#)
[Print Report](#)

Web Application

Zoom In 50 % Zoom Out Email Comments

Navigation block:

Business area		Fiscal year		Guide Type	
Labor Category		NASA Org		OG Type	
AR: ANN - FTE Rate, Qty, Amt					

Variable Values

Most Current Data	<= 293
Center	Glenn Research Center
Budget Year	2060
Agency Version	Pre-POP
Center Version	GRC Pre POP
NASA Org	Empty Demarcation
Labor Category	Not assigned

Center Control FTE Distribution

				Fiscal year 2058			2059			2060	
NASA Org	Labor Category	Guide Type	OG Type	FTE Rate \$K	FTE QTY	FTE \$K	FTE Rate \$K	FTE QTY	FTE \$K	FTE Rate \$K	FTE \$K
220140 AEROPROPULSION	Not assigned	In Guide	Not assigned	\$ 100.00000	10.0 FTE	\$ 1,000.000	\$ 104.00000	10.0 FTE	\$ 1,040.000	\$ 108.00000	\$ 1,080.000
220200 CFO	Not assigned	In Guide	Not assigned	\$ 80.00000	50.0 FTE	\$ 4,000.000	\$ 83.20000	50.0 FTE	\$ 4,160.000	\$ 86.40000	\$ 4,320.000
220500 OSAT	Not assigned	In Guide	Not assigned	\$ 70.00000	60.0 FTE	\$ 4,200.000	\$ 72.80000	60.0 FTE	\$ 4,368.000	\$ 75.20000	\$ 4,512.000



Entering Variables

- Once you have selected a report, you will be prompted to enter variables for the report
- The report will use the variables you enter to determine which records should be displayed (just like the header area in planning folders)

Variables for NASA: Single Query Template

Center	=	<input type="text"/>	to	<input type="text"/>	Include	<input type="button" value="Insert Row"/>
Budget Year (*)		<input type="text"/>				
Agency Version (*)		<input type="text"/>				
Center Version (*)		<input type="text"/>				
NASA Org	=	<input type="text"/>	to	<input type="text"/>	Include	<input type="button" value="Insert Row"/>
Labor Category	=	<input type="text"/>	to	<input type="text"/>	Include	<input type="button" value="Insert Row"/>

■ Features of the navigation block

- Drill-down
- Drill-across
- Filter Value

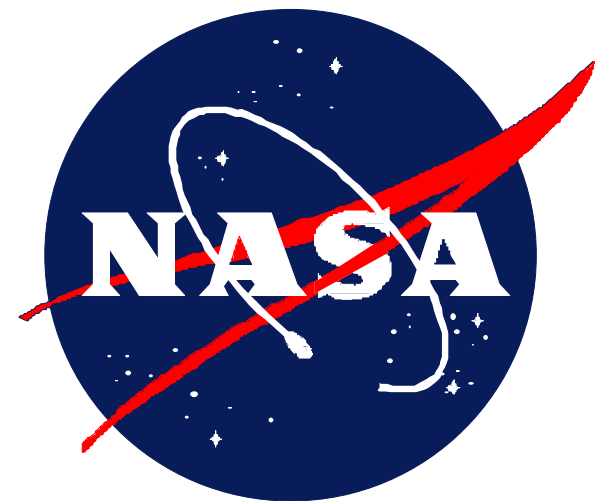
■ Miscellaneous

- Click the icon to hide the Navigation block, Variables block, or the Data block of a report
- Click the icon to show the Navigation block, Variables block, or the Data block of a report
- Dollar amounts are expressed in thousands (\$810,000)

- **Some useful features of the context menu**
 - **Exporting data to Excel**
 - **Sorting rows**
 - **Bookmaking**

Topic 4

Printing Reports



- **Reports can be formatted for printing so that**
 - **Page numbers appear**
 - **Screen colors are removed**
 - **Data fits better on a page**
 - **Headers and footers are included on each page**



- **To generate printable output**
 1. Run a report.
 2. Click the “Print Reports” menu item
 3. Click the “Print Table 1” sub-menu
 4. Adjust print settings
 5. Print.



Adjusting Print Settings

☒ Preview Mode

Header Line

height (inches) indent left (inches) indent right (inches)

Data Area

padding top (inches) indent left (inches) indent right (inches)

Data Rows **Data Columns**

Footer Line

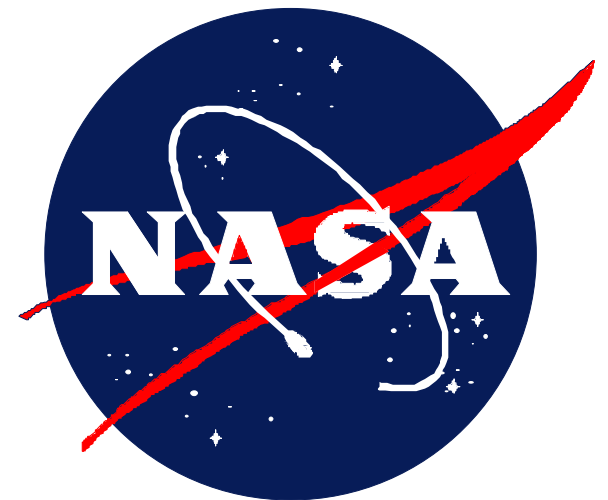
height (inches) indent left (inches) indent right (inches)

Select Print Orientation and Font

▼

Enter **Reset**

Business Rules and Version Control

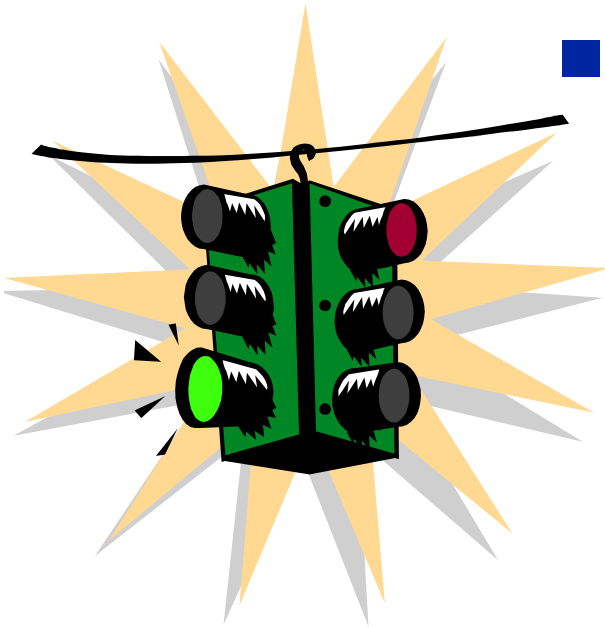


Business Rules



Implemented Business Rules

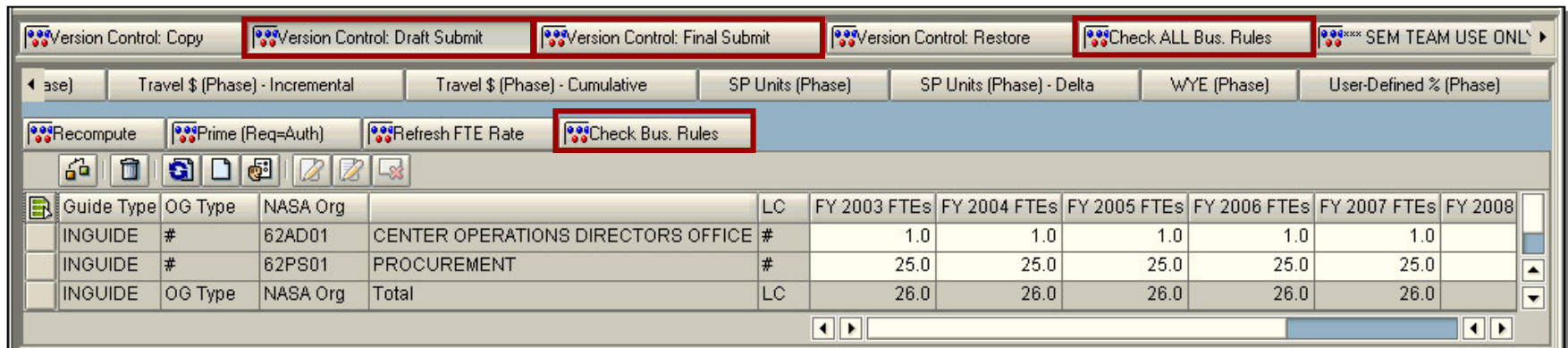
- Business Rules are application checks that verify data within the system. For example, business rules advise end-users if Authorized FTEs match Requested FTEs before being copied to the final version.



- There are four business rule categories in the initial release of the BF application
 - Authorized vs. Requested Annual Values
 - Authorized vs. Requested Monthly Values
 - Estimated vs. Requested Annual Values
 - Estimated vs. Requested Monthly Values



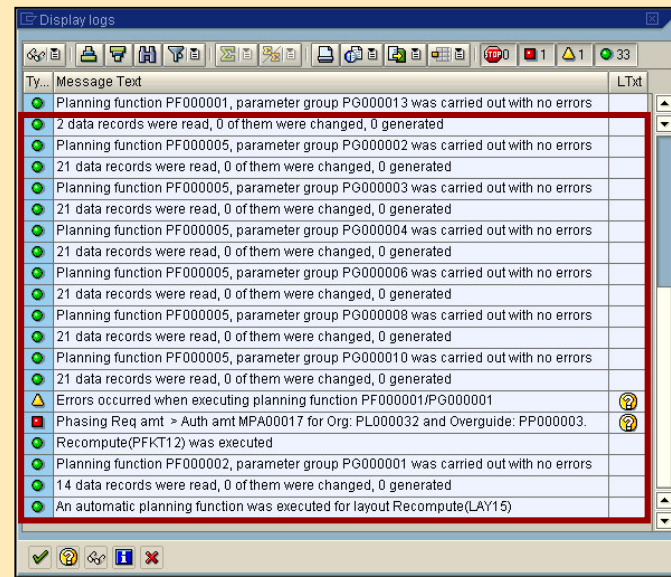
When are Business Rules Checked?



- Business Rules can be run manually by clicking the Check ALL Bus. Rules button. This will check all related Business Rules throughout the system.
- Business Rules can be run manually by clicking the Check Bus. Rules button. This will check all Business Rules for the view you are in.
- Business Rules will be automatically checked when submitting a Version Control Draft or Final Submit.

Business Rules Display

- Once you click on the Check ALL Bus. Rules, Version Control Draft Submit or Version Control Final Submit button, the list of business rules will appear.



The Business Rules will be categorized and totaled Red, Yellow, Green and Stop.



Stop – Prohibits you from proceeding



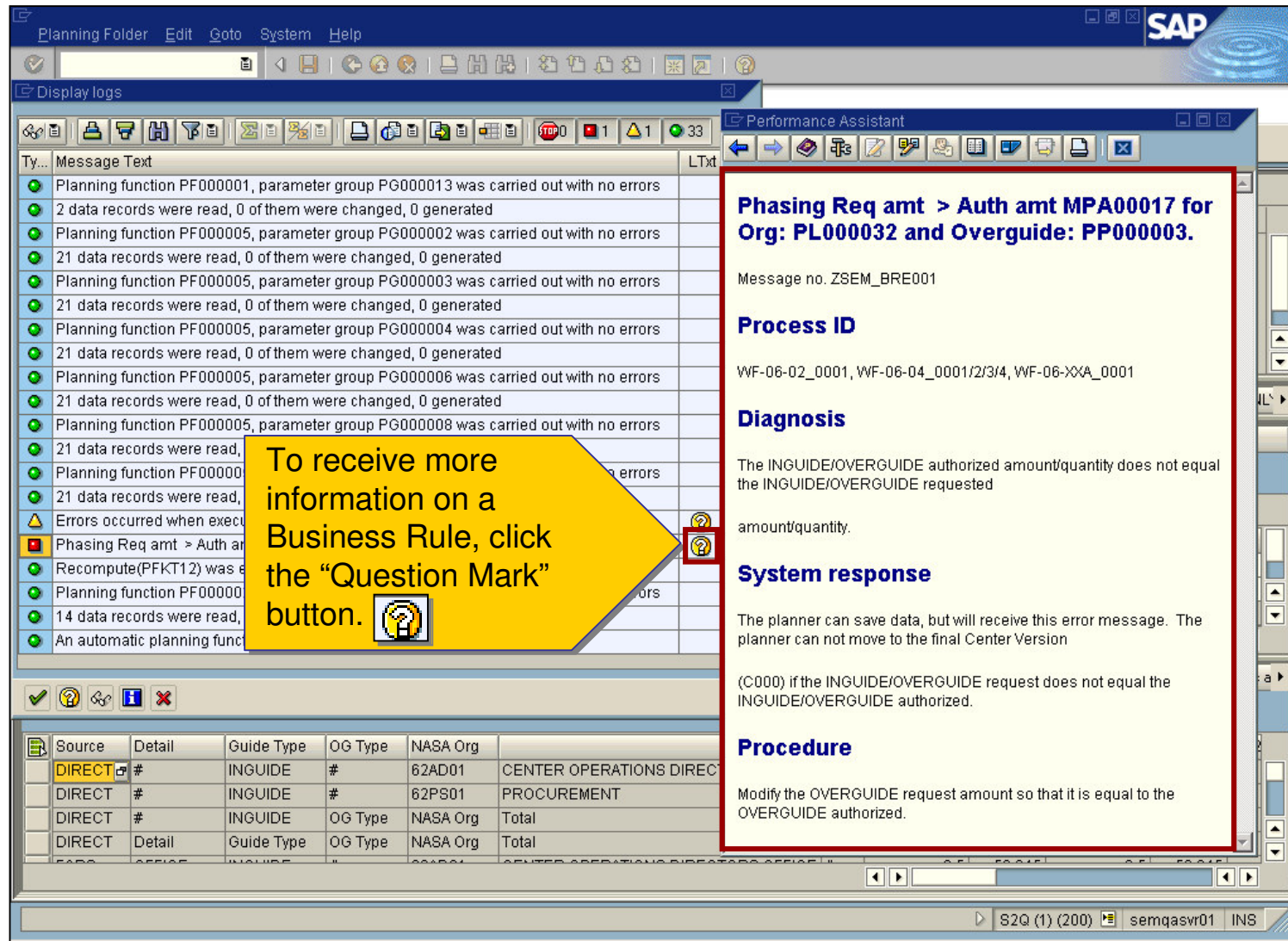
Red – Business Rule failed



Yellow – Business Rule warned



Green – Business Rule passed



Planning Folder Edit Goto System Help

Display logs

Performance Assistant

Message Text

- Planning function PF000001, parameter group PG000013 was carried out with no errors
- 2 data records were read, 0 of them were changed, 0 generated
- Planning function PF000005, parameter group PG000002 was carried out with no errors
- 21 data records were read, 0 of them were changed, 0 generated
- Planning function PF000005, parameter group PG000003 was carried out with no errors
- 21 data records were read, 0 of them were changed, 0 generated
- Planning function PF000005, parameter group PG000004 was carried out with no errors
- 21 data records were read, 0 of them were changed, 0 generated
- Planning function PF000005, parameter group PG000006 was carried out with no errors
- 21 data records were read, 0 of them were changed, 0 generated
- Planning function PF000005, parameter group PG000008 was carried out with no errors
- 21 data records were read, 0 of them were changed, 0 generated
- Planning function PF000005, parameter group PG000009 was carried out with no errors
- 21 data records were read, 0 of them were changed, 0 generated
- Errors occurred when executing planning function PF000005, parameter group PG000005
- Phasing Req amt > Auth amt MPA00017 for Org: PL000032 and Overguide: PP000003.
- Recompute(PFKT12) was executed
- Planning function PF000005, parameter group PG000005 was carried out with no errors
- 14 data records were read, 0 of them were changed, 0 generated
- An automatic planning function was carried out with no errors

Phasing Req amt > Auth amt MPA00017 for Org: PL000032 and Overguide: PP000003.

Message no. ZSEM_BRE001

Process ID

WF-06-02_0001, WF-06-04_0001/2/3/4, WF-06-XXA_0001

Diagnosis

The INGUIDE/OVERGUIDE authorized amount/quantity does not equal the INGUIDE/OVERGUIDE requested amount/quantity.

System response

The planner can save data, but will receive this error message. The planner can not move to the final Center Version (C000) if the INGUIDE/OVERGUIDE request does not equal the INGUIDE/OVERGUIDE authorized.

Procedure

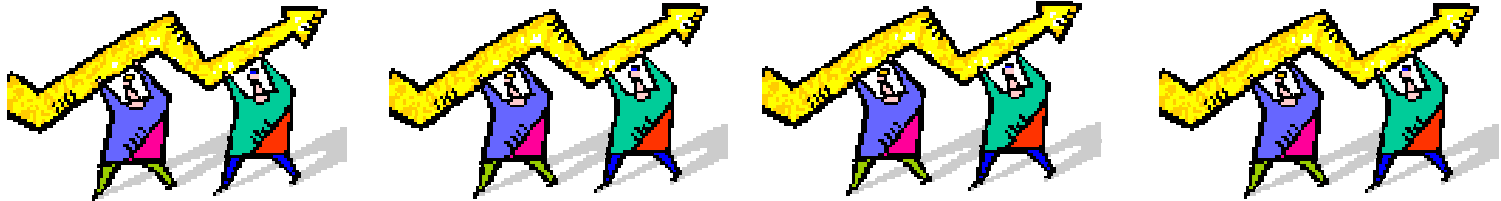
Modify the OVERGUIDE request amount so that it is equal to the OVERGUIDE authorized.

To receive more information on a Business Rule, click the "Question Mark" button.

Source	Detail	Guide Type	OG Type	NASA Org	
DIRECT	#	INGUIDE	#	62AD01	CENTER OPERATIONS DIRECT
DIRECT	#	INGUIDE	#	62PS01	PROCUREMENT
DIRECT	#	INGUIDE	OG Type	NASA Org	Total
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total

S2Q (1) (200) semqasvr01 INS

Version Control





Version Control

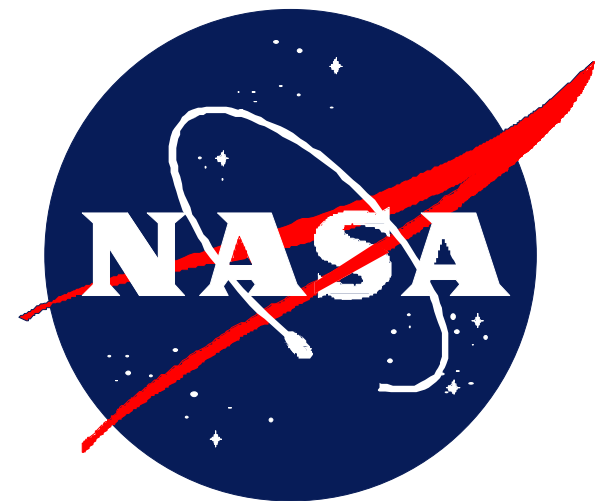
BUDGET CYCLE ACTIVITY	AGENCY VERSION	CENTER VERSION		CENTER SUBMIT VERSIONS	
Center Pre-POP	A001	C001 C002 C003 C004 C005	Baseline budget data carried over from previous year Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity. Project/Pool negotiations. Allocation of excess from Pools to Projects. Cost finalization and Final Center Director Approval. Code X area for strategic planning and "what-if" scenarios.	CENTER DRAFT SUBMIT VERSION C000	CENTER SUBMIT VERSION TO HEADQUARTERS C999
Center POP	A002	C001 C002 C003 C004 C005	Baseline budget data carried over from previous year Direct and Indirect rates established for Corporate and Center G&A, Service Pools, and Projects. Pools establish capacity. Project/Pool negotiations. Allocation of excess from Pools to Projects. Cost finalization and Final Center Director Approval. Code X area for strategic planning and "what-if" scenarios.		
Enterprise POP	A003		Enterprise balancing; no center input unless enterprise requests changes or rebalancing required due to Enterprise modifications.		
Agency POP	A004		Agency balancing; no center input unless enterprise/Code B requests changes or rebalancing required due to modifications.		
OMB Submit	A005		No Center input		
Congressional Submit	A006		No Center input		



Agency Versions

- Version A001- Center Pre-POP
 - Where Centers work on their Pre-POP
- Version A002 - Center POP
 - Where Centers work on their POP
- Version A003 – Enterprise POP
 - Where Enterprises review Center POP
- Version A004 – Agency POP
 - Where the Agency reviews the Enterprise POP
- Version A005 – OMB submit
 - This version gets submitted to OMB
- Version A006 – Congressional submit
 - This version gets submitted to Congress

Project Planning Authorizer: Secondary FTE and Travel \$ Distribution





Overview: Secondary FTE Distribution

- Activity 1: Review authorized FTEs from the Organization allocated to the Project* by reviewing a BW report
- Activity 2: Start Planning - Entering Header Data
- Activity 3: Distributing Annual FTEs from Organizations and Projects* to Project WBS elements
 - Input area
 - Output area
- Activity 4**: Reviewing corresponding BW reports
 - *Project is defined as Project Definition which is usually equivalent to the UPN-5 (i.e. 21-721-10)
 - **Combined with Secondary Travel Reports at end of Topic Section

- Annual Planning Input Layouts:
 - FTE (Annual)
 - FTE (Annual) Delta

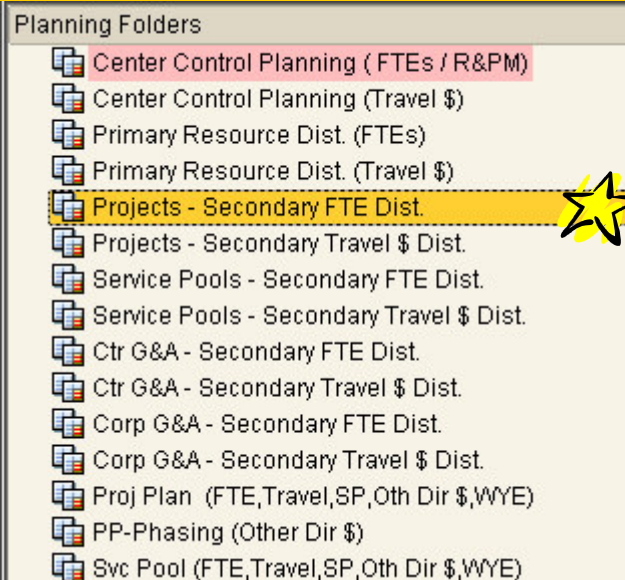
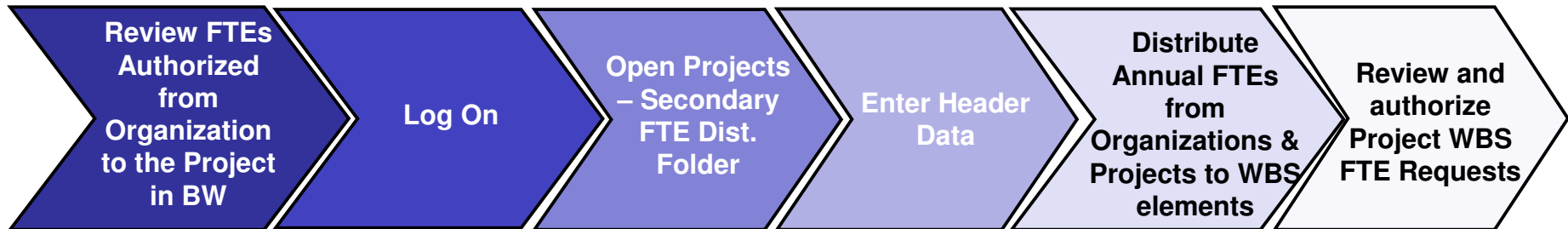
- Annual Planning Output Layouts:
 - FTE \$ (Annual)

- Phasing Plan
Output Layouts:
 - FTE (Phase)
 - FTE \$ (Phase)
 - FTE \$ (Phase) - Incremental
 - FTE \$ (Phase) - Cumulative





Process Flow: Secondary FTE Distribution



In the Projects – Secondary FTE Dist. Folder, Project Planning Authorizers perform the secondary distribution of FTEs from Project Definition to WBS elements.

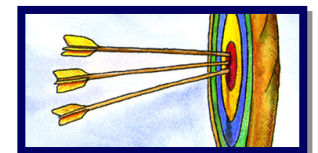
Why: FTE planning is an integral part of the Center's and Agency's strategic workforce plan; the FTE plan also drives the salary \$ (formerly known as FS41) requirement in Full Cost



Start Planning - Enter Header Data

- **Goal:** Enter the appropriate characteristics in the Header Area to define the data you want to plan
- **Why:** All planning data entered into the system is categorized and stored based on the Header Data combination

- **Steps for entering Header Data:**
 1. Log On
 2. Open “Projects Secondary FTE Distribution” folder
 3. Enter Header Data





Project Secondary FTE Distribution Folder

Project Secondary FTE Distribution – Header Layout

Name of Variable	Long description	Selection	Characteristic Value Ext. Display	Selection	CharVal...
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2006	2006		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Appropriation Type	Appropriation Type	SAT	Science and Tech		
Project Definition	Project Definition	21-721-10	21-721-10		
Organization	NASA Org	21AS	Space Technology Division		
Labor Category	LC	#	Not assigned		
Fiscal Year	Fiscal year	2004	2004		

Name of Variable	Long description	Selection	Characteristic Value Ext. Display
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Appropriation Type	Appropriation Type	SAT	Science and Tech
Project Definition	Project Definition	21-721-10	21-721-10
Organization	NASA Org	21AS	Space Technology Division
Labor Category	LC	#	Not assigned
Fiscal Year	Fiscal year	2004	2004

Header Data

What goes in the Header Area?

Header Area				
	Name of Variable	Long description	Selection	Characteristic Value Ext. Display
<input type="checkbox"/>	Center	BA	21	Ames Research Center
<input type="checkbox"/>	Budget Year	Budget Year	2006	2006
<input type="checkbox"/>	Agency Version	Agency Version	A001	Pre-POP
<input type="checkbox"/>	Center Version	Center Version	C001	C001
<input type="checkbox"/>	Appropriation Type	Appropriation Type	SAT	Science and Tech
<input type="checkbox"/>	Project Definition	Project Definition	21-721-10	21-721-10
<input type="checkbox"/>	Organization	NASA Org	21AS	Space Technology Division
<input type="checkbox"/>	Labor Category	LC	#	Not assigned
<input type="checkbox"/>	Fiscal Year	Fiscal year	2004	2004

1) Enter the following in the Header Area to define the data that you want to plan:

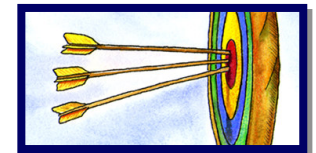
Center	The two-digit Center number
Budget Year	The year you are planning
Agency Version	The Agency Version you are working in (A001-A006)
Center Version	The Center Version you are working in (C001-C005)
Appropriation Type	The Appropriation the Project belongs to (SAE or SFC)
Project Definition	The Project Definition you are planning for
Organization	The Organization you are planning for
Labor Category	The Labor Category you are planning for (if applicable)
Fiscal Year	The fiscal year you are working in (Budget Year -2)

2) Click the **Transfer Variables button**  to set the data you want to plan



Distributing Annual FTEs from Projects to WBS elements

- **Goal:** Take the annual Project and Organization FTE Control Total and distribute to the WBS elements
- **Why:** In order for the performing WBS elements to know how many FTEs are available for the task, the Project Authorizer is responsible for taking the available FTEs allocated to the Project by the Organization and dividing them up among the performing WBS elements

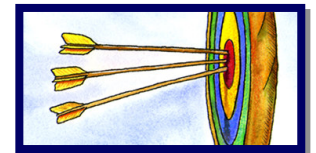




Distributing Annual FTEs from Projects to WBS elements (Cont.)

■ Steps for distributing Annual FTEs:

1. Log On
2. Open “Project – Secondary FTE Distribution” folder
3. Enter Header Data
4. Click the **Transfer Header Variables button**
5. Click the **FTE (Annual) button**
6. Enter the Input area data
7. Click the **Save button** to save your data





What goes in the Input Layout?

FTE (Annual) – Input Area

FTE (Annual) | FTE (Annual) - Delta

Recompute | Refresh FTE Rates | Check Bus. Rules

Icons: Save, Print, Undo, Redo, Find, Help, etc.

Guide Type	OG Type	WBS element		Network	Network activity	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs	FY 2010 FTEs
INGUIDE	#	21-721-10-	Systems Enginee...	#	#	0.0	0.0	0.0	17.0	25.0	25.0	25.0
INGUIDE	#	21-721-10-12	Systems Enginee...	#	#	10.0	10.0	10.0	0.0	0.0	0.0	0.0
INGUIDE	#	21-721-10-13	Systems Enginee...	#	#	7.0	7.0	7.0	0.0	0.0	0.0	0.0
INGUIDE	#	21-721-10-15	Systems Enginee...	#	#	8.0	8.0	8.0	8.0	0.0	0.0	0.0
INGUIDE	OG Type	WBS element	Total	#	#	25.0	25.0	25.0	25.0	25.0	25.0	25.0
Guide Type	OG Type	WBS element	Total	#	#	25.0	25.0	25.0	25.0	25.0	25.0	25.0

- 1) Click the **FTE (Annual)** button
- 2) Click the **Append Row** button to add a row
- 3) Enter the following:

Guide Type Inguide or Overguide

OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned
You must use unassigned (#) if you selected inguide

WBS element The WBS elements you are distributing FTEs to

Network The Network you are distributing FTEs to (if applicable, # for unassigned)

Network activity The Network activity you are distributing FTEs to (if applicable, # for unassigned)

FTEs per Year Enter FTEs for two previous years, the budget year and four outyears



What goes in the Input Layout? (Cont.)

FTE (Annual) – Input Area

FTE (Annual)
FTE (Annual) - Delta

Recompute
Refresh FTE Rates
Check Bus. Rules

Save
Print
Refresh
Undo
Redo
Help

Guide Type	OG Type	WBS element		Network	Network activity	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs	FY 2010 FTEs
INGUIDE	#	21-721-10-	Systems Enginee...	#	#	0.0	0.0	0.0	17.0	25.0	25.0	25.0
INGUIDE	#	21-721-10-12	Systems Enginee...	#	#	10.0	10.0	10.0	0.0	0.0	0.0	0.0
INGUIDE	#	21-721-10-13	Systems Enginee...	#	#	7.0	7.0	7.0	0.0	0.0	0.0	0.0
INGUIDE	#	21-721-10-15	Systems Enginee...	#	#	8.0	8.0	8.0	8.0	0.0	0.0	0.0
INGUIDE	OG Type	WBS element	Total	#	#	25.0	25.0	25.0	25.0	25.0	25.0	25.0
Guide Type	OG Type	WBS element	Total	#	#	25.0	25.0	25.0	25.0	25.0	25.0	25.0

- 4) Click the **Transfer Variables button** to sort the row of data you entered & total the input area
- 5) Click the **Recompute button** to transfer data from the input area to the output area
- 6) Click the **Refresh FTE Rates button** to bring in the newest FTE rates
- 7) Repeat for all of the WBS elements you are responsible for
- 8) Click the **FTE (Annual) - Delta button** to view Authorized vs. Requested FTE totals
- 9) Click the **Save button** to save your data



Where can I see the output?

FTE \$ (Annual) – Output Layout

FTE \$ (Annual) – Output Layout													
FTE \$ (Annual)		FTE (Phase)		FTE \$ (Phase)		FTE \$ (Phase) - Incremental		FTE \$ (Phase) - Cumulative					
Guide Type	OG Type	WBS element		Network	Network activity	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$	
INGUIDE	#	21-721-10-	Systems Engineering/architecture	#	#	0.000	0.000	0.000	2,295.000	3,425.000	3,475.000	3,525.000	
INGUIDE	#	21-721-10-12	Systems Engineering/Architecture	#	#	1,250.000	1,280.000	1,300.000	0.000	0.000	0.000	0.000	
INGUIDE	#	21-721-10-13	Systems Engineering / Architecture	#	#	875.000	896.000	910.000	0.000	0.000	0.000	0.000	
INGUIDE	#	21-721-10-15	Systems Engineering / Architecture	#	#	1,000.000	1,024.000	1,040.000	1,080.000	0.000	0.000	0.000	
INGUIDE	OG Type	WBS element	Total	#	#	3,125.000	3,200.000	3,250.000	3,375.000	3,425.000	3,475.000	3,525.000	
Guide Type	OG Type	WBS element	Total	#	#	3,125.000	3,200.000	3,250.000	3,375.000	3,425.000	3,475.000	3,525.000	

- 1) Click the **FTE \$ (Annual)** output button to view the output area; the dollars are calculated based on the organization FTE rate.
- 2) The following information is shown:

Guide Type

Inguide or Overguide

OG Type

The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.

WBS element

The WBS elements distributed to

Network

The Network distributed to (# = unassigned)

Network activity

The Network activity distributed to (# = unassigned)

FY 20XX \$

The dollars associated with the FTEs (equal to FTEs X Rate).

Totals

The totals for all WBS elements listed



Overview: Secondary Travel \$ Distribution

- Activity 1: Review authorized Travel \$ from the Organization allocated to the Project* by reviewing a BW report
- Activity 2: Start Planning - Entering Header Data
- Activity 3: Distribute Annual Travel \$ from Project and Organization to Project WBS elements
 - Input area
 - Output area
- Activity 4**: Reviewing corresponding reports
 - *Project is defined as Project Definition which is usually equivalent to the UPN-5 (i.e. 21-721-10)
 - **Combined with Secondary FTE distribution Reports at end of Topic Section

Secondary Travel \$ Distribution Folder Overview

- Annual Planning Input Layouts:
 - Travel \$ (Annual)
 - Travel \$ (Annual) – Delta

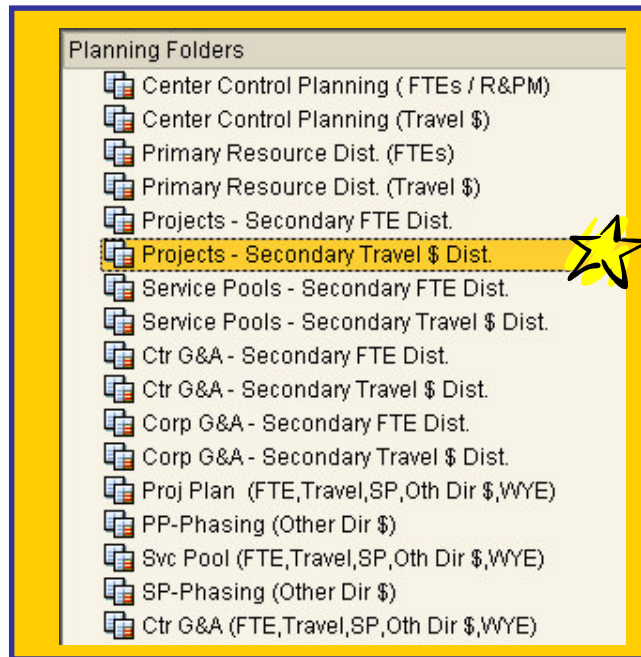
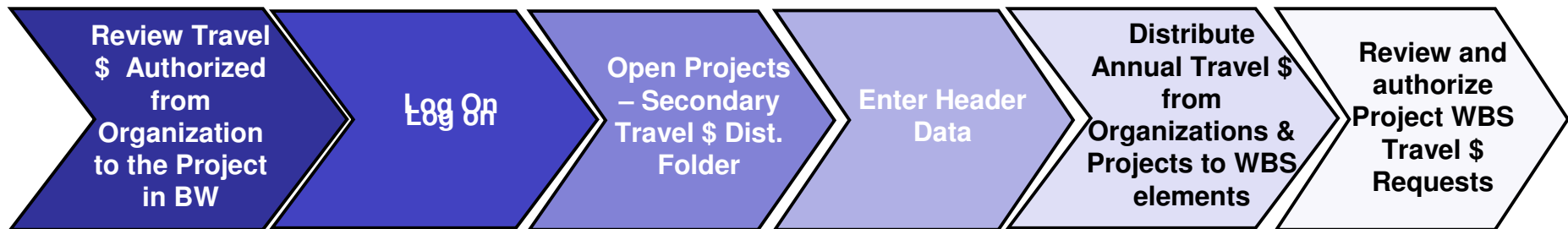
- Annual Planning Output Layouts:
 - Travel \$ (Annual)

- Phasing Plan
Output Layouts:
 - Travel \$ (Phase)
 - Travel \$ (Phase) - Incremental
 - Travel \$ (Phase) - Cumulative





Process Flow: Secondary Travel \$ Distribution



In the Projects – Secondary Travel \$ Dist. Folder, Project Planning Authorizers perform the secondary distribution of Travel \$ from Project Definition to WBS elements

Why: Travel \$ planning drives the Agency's Travel requirement; Travel funds (formerly known as FS42) are one year funds and have stringent guidelines that the Centers and Agency have to manage

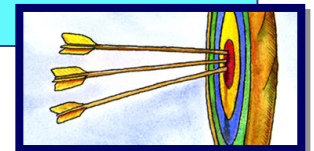


Start Planning- Enter Header Data

- Goal: Enter the appropriate characteristics in the Header Area to define the data you want to plan

- **Why:** All planning data entered into the system is categorized and stored based on the Header Data combination

- **Steps for entering header data:**
 1. Log On
 2. Open “Project Secondary Travel \$ Distribution” folder
 3. Enter Header Data





Project Planning Secondary Travel \$ Distribution Folder


Project Secondary Travel \$ Distribution – Header Layout

Name of Variable	Long description	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Appropriation Type	Appropriation Type	SAT	Science and Tech
Project Definition	Project Definition	21-721-10	21-721-10
Organization	NASA Org	21AS	Space Technology Division
Fiscal Year	Fiscal year	2004	2004

Name of Variable	Long description	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Appropriation Type	Appropriation Type	SAT	Science and Tech
Project Definition	Project Definition	21-721-10	21-721-10
Organization	NASA Org	21AS	Space Technology Division
Fiscal Year	Fiscal year	2004	2004

Header Data

What goes in the Header Area?

Header Area			
Name of Variable	Long description	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	 C001	C001
Appropriation Type	Appropriation Type	SAT	Science and Tech
Project Definition	Project Definition	21-721-10	21-721-10
Organization	NASA Org	21AS	Space Technology Division
Fiscal Year	Fiscal year	2004	2004

1) Enter the following in the Header Area to define the data that you want to plan:

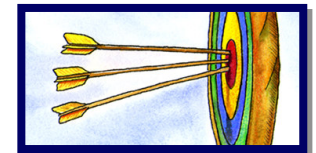
Center	The two-digit Center number
Budget Year	The year you are planning
Agency Version	The Agency Version you are working in (A001-A006)
Center Version	The Center Version you are working in (C001-C005)
Appropriation Type	The appropriation the Project belongs to (SAE or SFC)
Project Definition	The Project Definition you are planning for
Organization	The Organization you are planning for
Fiscal Year	The fiscal year you are working in (Budget Year -2)

2) Click the **Transfer Variables button**  to set the data you want to plan.



Distributing Annual Travel \$ from Projects to WBS elements

- **Goal:** Take the annual Project and Organization Travel \$ Control Total and distribute to the WBS elements
- **Why:** In order for the performing WBS elements to know how much Travel \$ are available for the task, the Project Authorizer is responsible for taking the available Travel \$ allocated to the Project by Organizations and dividing it up among the performing WBS elements

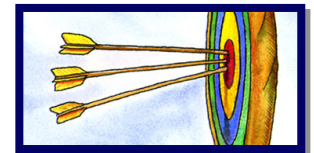




Distributing Annual Travel \$ from Projects to WBS elements (Cont.)

■ Steps for distributing Travel \$:

1. Log On
2. Open “Project – Secondary Travel \$ Distribution” folder
3. Enter Header Data
4. Click the **Transfer Header Variables button**
5. Click the **Travel \$ (Annual) button**
6. Enter Input area data
7. Click the **Save button** to save your data



What goes in the Input Layout?

Travel \$ (Annual) – Input Area

Travel \$ (Annual)
Travel \$ (Annual) - Delta

Refresh Travel \$
Check Bus. Rules

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✖️

Guide Type	OG Type	WBS element		Network	Network activity	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$
INGUIDE	#	21-721-10-	Systems Engineering/...	#	#	0.000	0.000	0.000	85.000	100.000	100.000	100.000
INGUIDE	#	21-721-10-12	Systems Engineering/...	#	#	40.000	40.000	40.000	0.000	0.000	0.000	0.000
INGUIDE	#	21-721-10-13	Systems Engineering /...	#	#	35.000	35.000	35.000	0.000	0.000	0.000	0.000
INGUIDE	#	21-721-10-15	Systems Engineering /...	#	#	15.000	15.000	15.000	15.000	0.000	0.000	0.000
INGUIDE	OG Type	WBS element	Total	#	#	90.000	90.000	90.000	100.000	100.000	100.000	100.000
Guide Type	OG Type	WBS element	Total	#	#	90.000	90.000	90.000	100.000	100.000	100.000	100.000

- 1) Click the **Travel \$ (Annual)** button
- 2) Click the **Append Row** button to add a row
- 3) Enter the following:

Guide Type Inguide or Overguide

OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned.
You must use unassigned (#) if you selected inguide

WBS element The WBS elements you are distributing Travel \$ to

Network The Network you are distributing Travel \$ to (if applicable, # for unassigned)

Network activity The Network activity you are distributing Travel \$ to (if applicable, # for unassigned)

Travel \$ per Year Enter Travel \$ for two previous years, the budget year and four out years



What goes in the Input Layout?

Travel \$ (Annual) – Input Area

Travel \$ (Annual)
Travel \$ (Annual) - Delta


Refresh Travel \$
Check Bus. Rules

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	Guide Type	OG Type	WBS element		Network	Network activity	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$
	INGUIDE	#	21-721-10-	Systems Engineering/...	#	#	0.000	0.000	0.000	85.000	100.000	100.000	100.000
	INGUIDE	#	21-721-10-12	Systems Engineering/...	#	#	40.000	40.000	40.000	0.000	0.000	0.000	0.000
	INGUIDE	#	21-721-10-13	Systems Engineering /...	#	#	35.000	35.000	35.000	0.000	0.000	0.000	0.000
	INGUIDE	#	21-721-10-15	Systems Engineering /...	#	#	15.000	15.000	15.000	15.000	0.000	0.000	0.000
	INGUIDE	OG Type	WBS element	Total	#	#	90.000	90.000	90.000	100.000	100.000	100.000	100.000
	Guide Type	OG Type	WBS element	Total	#	#	90.000	90.000	90.000	100.000	100.000	100.000	100.000

- 4) Click the **Transfer Variables button** to sort data you entered and total the input area.
- 5) Click the **Recompute button** to transfer data from the input area to the output area.
- 6) Click the **Refresh Travel \$ button** to bring in the most recent travel \$
- 7) Repeat for all of the WBS elements you are responsible for.
- 8) Click the **Travel \$ (Annual) - Delta button** to view Authorized vs. Requested Travel \$ totals
- 9) Click the **Save button** to save your data

Where can I see the output?

Travel \$ (Annual) – Output Layout													
Travel \$ (Annual)		Travel \$ (Phase)		Travel \$ (Phase) - Incremental		Travel \$ (Phase) - Cumulative							
	Guide Type	OG Type	WBS element		Network	Network activity	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$
	INGUIDE	#	21-721-10-	Systems Engineering/architecture	#	#	0.000	0.000	0.000	85.000	100.000	100.000	100.000
	INGUIDE	#	21-721-10-12	Systems Engineering/Architecture	#	#	40.000	40.000	40.000	0.000	0.000	0.000	0.000
	INGUIDE	#	21-721-10-13	Systems Engineering / Architecture	#	#	35.000	35.000	35.000	0.000	0.000	0.000	0.000
	INGUIDE	#	21-721-10-15	Systems Engineering / Architecture	#	#	15.000	15.000	15.000	15.000	0.000	0.000	0.000
	INGUIDE	OG Type	WBS element	Total	#	#	90.000	90.000	90.000	100.000	100.000	100.000	100.000
	Guide Type	OG Type	WBS element	Total	#	#	90.000	90.000	90.000	100.000	100.000	100.000	100.000

1) Click the **Travel \$ (Annual) output button** to view the output area.

2) The following information is shown:

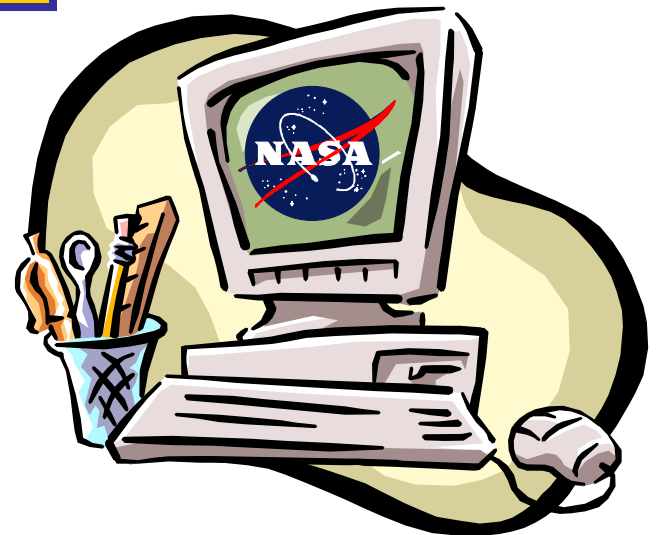
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned
WBS element	The WBS element distributed to
Network	The Network distributed to (# = unassigned)
Network activity	The Network activity distributed to (# = unassigned)
FY 20XX \$	The actual dollars associated with Travel by Organization.
Totals	The totals for all Organizations listed.

Demonstrations and Exercises

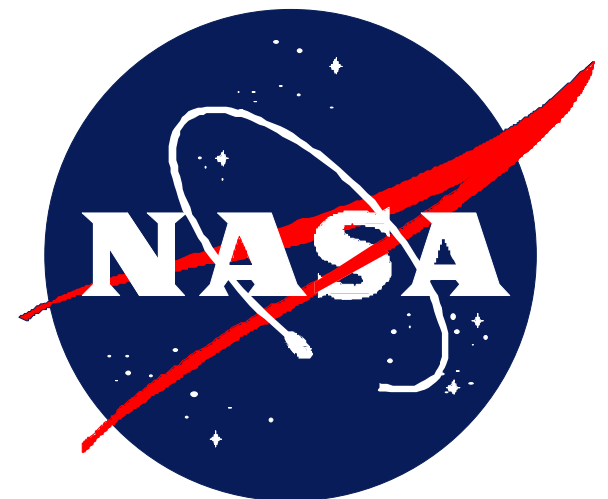
- Now, let's get our hands on the system.



Using your exercise handout, go to
***Project Planning & Corporate G&A
Authorizer Exercise: (steps 1-27)***



Project Planning Requester: Bottom-Up Project Requests





Overview: Bottom-Up Project Requests

This section will focus on bottom-up Project requesting for:

- FTEs Annual
- WYEs Annual
- Travel Dollars Annual
- SP Units Annual
- Other Direct Dollars Annual
- Corresponding reports



Project (FTE, Travel, SP, Other Direct \$, WYE) Folder Overview

■ Annual Planning Input Layouts:

- FTE (Annual)
- FTE (Annual) - Delta
- Travel \$ (Annual)
- Travel \$ (Annual) – Delta
- SP Units (Annual)
- SP Units (Annual) – Delta
- Other Dir \$ (Annual)*
- WYE (Annual)*



* These planning processes do not have a delta screen because the planning is done by the requester for bottoms-up planning only.



Project (FTE, Travel, SP, Other Direct \$, WYE) Folder Overview

■ Phasing Plan Input Layouts:

- FTE (Phase)
- FTE \$ (Phase) – Incremental
- FTE \$ (Phase) – Cumulative
- Travel \$ (Phase)
- Travel \$ (Phase) – Incremental
- Travel \$ (Phase) – Cumulative
- SP Units (Phase)
- SP Units (Phase) – Delta
- WYE (Phase)
- User-Defined % (Phase)



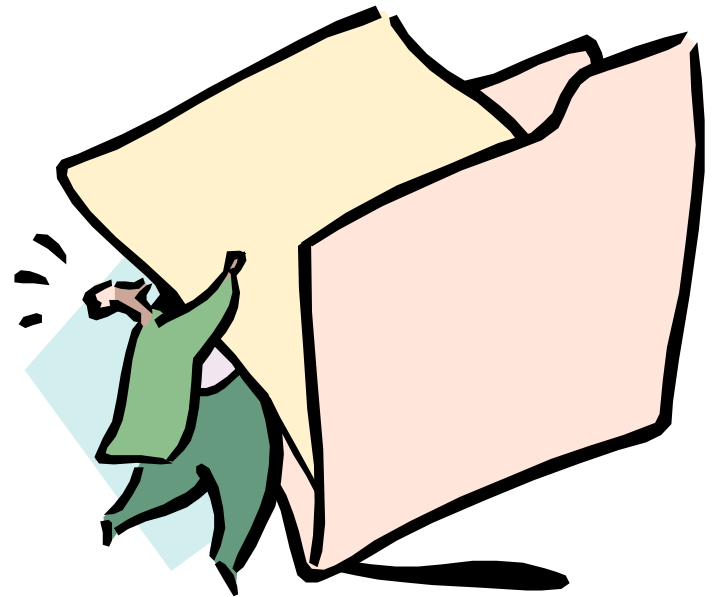
Project (FTE, Travel, SP, Other Direct \$, WYE) Folder Overview

■ Annual Planning Output Layouts:

- FTE and \$ (Annual)
- Travel \$ (Annual)
- SP Units and \$ (Annual)
- Other Dir \$ (Annual)
- WYE (Annual)

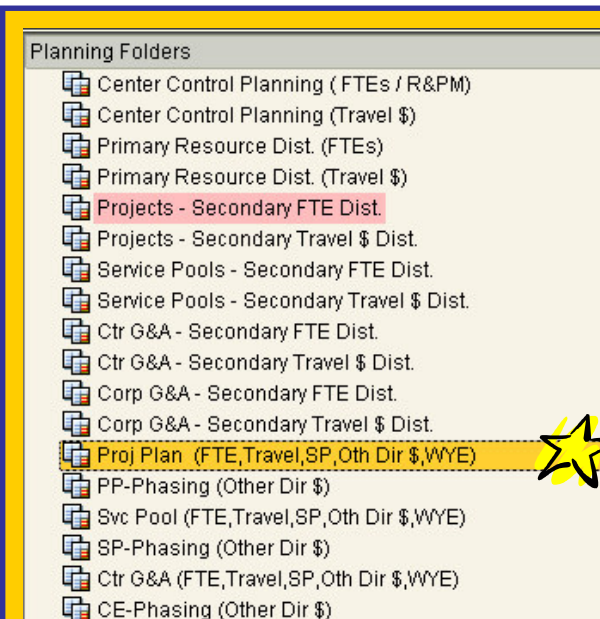
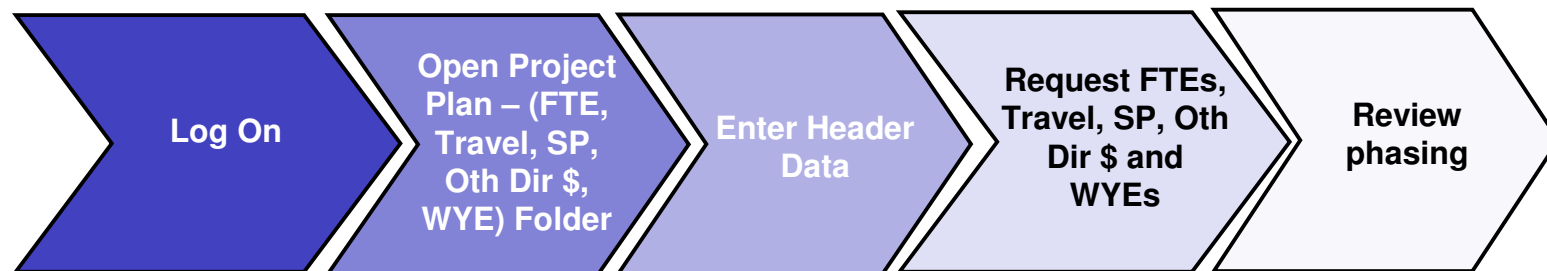
■ Phasing Plan Output Layouts:

- FTE and \$ (Phase)
- Travel \$ (Phase)
- SP Units and \$ (Phase)
- Other Dir \$ (Phase)
- WYE (Phase)





Process Flow: Bottom-Up Project Requests



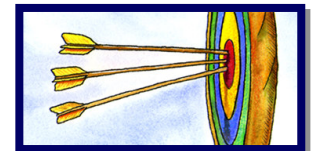
In the Project Planning (FTE, Travel, SP, Oth Dir \$, WYE) folder, the Project Planning Requester requests FTEs, Travel \$, Service Pool units, Other Direct \$ and WYEs for the WBS element.

Why: In order to plan a Full Cost budget, the Project WBS element must build-up its budget according to all the components of full cost, which include workforce (FTEs & WYEs), Travel \$, service pool utilization (SP units), and procurement (Oth Dir \$).

Enter Header Data

- Goal: Enter the appropriate characteristics in the Header Area, to define the data you want to plan
- **Why:** All planning data entered into the system is categorized and stored based on the Header Data combination

- Steps for entering header data:
 1. Log On
 2. Open the Project Planning (FTE, Travel, SP, Other Dir \$, WYE) folder
 3. Enter Header Data





Project Planning (FTE, Travel, SP, Other Dir \$, WYE) Folder

Project Plan (FTE, Travel, SP, Other Dir \$, WYE) Requester – Header Layout

Name of Variable	Long description	Selection	Characteristic Value Ext. Display	Selection	CharValExt
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2006	2006		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Type of Planning	Type of Planning	NOA	New Obligation Auth.		
Appropriation Type	Appropriation Type	SAT	Science and Tech		
WBS Element	WBS element	21-721-10-	Systems Engineering/architecture		
Network	Network	#	Not assigned		
Activity	Network activity	#	Not assigned		
Fiscal Year	Fiscal year	2004	2004		

Name of Variable	Long description	Selection	Characteristic Value Ext. Display	Units (Annual) - Delta	SP \$ (A)
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2006	2006		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Type of Planning	Type of Planning	NOA	New Obligation Auth.		
Appropriation Type	Appropriation Type	SAT	Science and Tech		
WBS Element	WBS element	21-721-10-	Systems Engineering/architecture		
Network	Network	#	Not assigned		
Activity	Network activity	#	Not assigned		
Fiscal Year	Fiscal year	2004	2004		

FTEs	FY 2006 \$	FY 2007 FTEs
5.0	0.000	5.0
5.0	0.000	5.0

Header Data



What goes in the Header Area?

Header Area				
	Name or variable	Long description	Selection	Characteristic value Ext. Display
	Center	BA	21	Ames Research Center
	Budget Year	Budget Year	2006	2006
	Agency Version	Agency Version	A001	Pre-POP
	Center Version	Center Version	C001	C001
	Type of Planning	Type of Planning	NOA	New Obligation Auth.
	Appropriation Type	Appropriation Type	SAT	Science and Tech
	WBS Element	WBS element	21-721-10-	Systems Engineering/architecture
	Network	Network	#	Not assigned
	Activity	Network activity	#	Not assigned
	Fiscal Year	Fiscal year	2004	2004

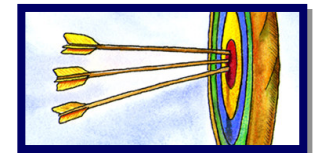
1) Enter the following in the Header Area to define the data that you want to plan:

Center	The two-digit Center number
Budget Year	The year you are planning
Agency Version	The Agency Version you are working in (A001-A006)
Center Version	The Center Version you are working in (C001-C005)
Type of Planning	The type of Budget Plan (NOA or COST)
Appropriation Type	The appropriation the Project belongs to (SAT or HSF)
WBS Element	The WBS Element you are planning for
Network	The Network you are planning for (# - unassigned)
Network Activity	The Network activity you are planning for (# - unassigned)
Fiscal Year	The fiscal year you are working in (Budget Year -2)

2) Click the **Transfer Variables button** to set the data you want to plan.

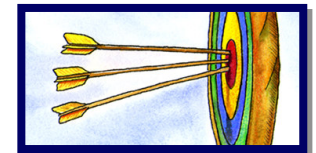
Requesting Annual FTEs

- Goal: Request annual FTEs from Organizations by Project WBS elements
- Why: As part of the budget build-up, the project planning requester must determine the workforce requirement needed for the WBS element task, which includes planning the number of FTEs needed. This planning will also drive the civil servant salary (formerly known as FS41) required by the WBS element through FTE rate calculation.



Requesting Annual FTEs (Cont.)

- Steps for entering header data:
 1. Log On
 2. Open “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
 3. Enter Header Data
 4. Click the **Transfer Header Variables button**
 5. Click the **FTE (Annual) button**
 6. Enter Input area data





What goes in the Input Layout? Checking for FTE allocations

FTE (Annual) – Input Area

FTE (Annual)	FTE (Annual) - Delta	FTE \$ (Annual)	Travel \$ (Annual)	Travel \$ (Annual) - Delta	SP Units (Annual)	SP Units (Annual) - Delta	SP \$ (A ▶)
--------------	----------------------	-----------------	--------------------	----------------------------	-------------------	---------------------------	-------------

Recompute
Prime (Req=Auth)
Refresh FTE Rate
Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs	FY 2010 FTEs	FTEs - BTC	Total FTEs
INGUIDE	#	21AS	Space Technology Division	#	5.0	5.0	5.0	5.0	5.0	0.0	0.0
INGUIDE	OG Type	NASA Org	Total	LC	5.0	5.0	5.0	5.0	5.0	0.0	0.0

Note: Prior to beginning your planning and requesting of FTEs, you can push the Prime (Req = Auth) button in order to prime your planning layout with the number of FTEs allocated to your WBS element by the Project and Organization in the top down planning process. This automated process is for your planning information. You can then continue to plan over these numbers or keep them.





What goes in the Input Layout?

FTE (Annual) – Input Area

FTE (Annual)	FTE (Annual) - Delta	FTE \$ (Annual)	Travel \$ (Annual)	Travel \$ (Annual) - Delta	SP Units (Annual)	SP Units (Annual) - Delta	SP \$ (A ▶)
--------------	----------------------	-----------------	--------------------	----------------------------	-------------------	---------------------------	-------------

Recompute Prime (Req=Auth) Refresh FTE Rate Check Bus. Rules

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Guide Type	OG Type	NASA Org		LC	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs	FY 2010 FTEs	FTEs - BTC	Total FTEs
INGUIDE	#	21AS	Space Technology Division	#	5.0	5.0	5.0	5.0	5.0	0.0	0.0
INGUIDE	OG Type	NASA Org	Total	LC	5.0	5.0	5.0	5.0	5.0	0.0	0.0

- 1) Click the **FTE (Annual)** button
- 2) Click the **Append Row** button to add a row
- 3) Enter the following:

Guide Type Inguide or Overguide

OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned.
 You must use unassigned (#) if you selected inguide.

NASA Org The directorate or division the Project WBS is requesting FTEs from

Labor Category The labor category assigned to the FTEs (# - unassigned)

FTEs per Year Enter FTE requests for two previous years, the budget year and four out years



What goes in the Input Layout? (Cont.)

FTE (Annual) – Input Area

Guide Type	OG Type	NASA Org		LC	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs	FY 2010 FTEs	FTEs - BTC	Total FTEs
INGUIDE	#	21AS	Space Technology Division	#	5.0	5.0	5.0	5.0	5.0	0.0	0.0
INGUIDE	OG Type	NASA Org	Total	LC	5.0	5.0	5.0	5.0	5.0	0.0	0.0

- 4) Click the **Transfer Variables button** to sort the row of data you entered and total the input area
- 5) Click the **Refresh FTE Rate button** to bring in the newest FTE rates
- 6) Click the **Recompute button** to transfer data from the input area to the output area
- 7) Repeat for all of the Organizations that you are responsible for
- 8) Click the **Save button** to save your data



Where can I see the output?

FTE and \$ (Annual) – Output Layout

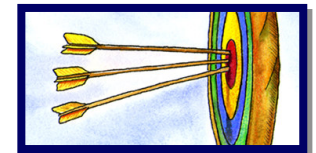
FTE and \$ (Annual) – Output Layout																		
FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)		SP Units a				
Source	Detail	Guide Type	OG Type	NASA Org		LC	FY 20...	FY 2004 \$	FY 2...	FY 2005 \$	FY 2...	FY 2006 \$	FY 2...	FY 2007 \$	FY 2...	FY 2008 \$	FY 20...	FY 2009 \$
DIRECT	#	INGUIDE	#	21AS	Space Tech...	#	5.0	625.000	5.0	640.000	5.0	650.000	5.0	675.000	5.0	685.000	5.0	695.0
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	5.0	650.000	5.0	675.000	5.0	685.000	5.0	695.0
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	5.0	650.000	5.0	675.000	5.0	685.000	5.0	695.0
Source	Detail	Guide Type	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	5.0	650.000	5.0	675.000	5.0	685.000	5.0	695.0

- 1) Click the **FTE and \$ (Annual) output button** to view the output area.
- 2) In the input area, click the **Refresh FTE Rate button** to calculate the dollars associated with FTEs
- 3) The following information is shown:

Source	The name of the Service Pool, G&A or Direct if planned yourself
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned
NASA Org	The directorate or division the FTEs are being requested from
Labor Category	The labor category assigned to the FTEs (# - unassigned)
FY 20XX FTEs	The number of requested FTEs
FY 20XX \$	The dollars associated with the FTEs (equal to FTEs X Rate)
Totals	The totals for all Organizations listed

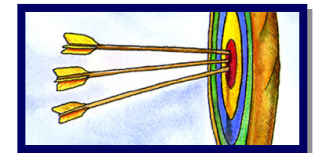
Requesting Annual WYEs

- Goal: Request annual WYEs by Organizations
- **Why:** As part of the budget build-up, the project planning requester must determine the workforce requirement needed for the WBS element task, which continues with planning the number of WYEs needed. The dollars associated with the number WYEs will be planned as procurement dollars under Other Dir \$.



Requesting Annual WYEs

- Steps for entering header data:
 1. Log On
 2. Open “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
 3. Enter Header Data
 4. Click the **Transfer Header Variables button**
 5. Click the **WYE (Annual) button**
 6. Enter Input area data





What goes in the Input Layout?

WYE (Annual) – Input Area

Guide Type	OG Type	NASA Org		Contract	Vendor ...	Location	WYE - Prior Year(s)	FY 2004 WYEs	FY 2005 WYEs	FY 2006 WYEs	FY 2007 WYEs
INGUIDE	#	21AS	Space Technology ...	UCONTRACT1	Unassi...	ONSITE	0.0	7.0	7.0	7.0	7.0
INGUIDE	#	21SF	Space Projects Divi...	UCONTRACT2	Unassi...	ONSITE	0.0	12.0	12.0	12.0	12.0
INGUIDE	OG Type	NASA Org	Total	Contract		Location	0.0	19.0	19.0	19.0	19.0
Guide Type	OG Type	NASA Org	Total	Contract		Location	0.0	19.0	19.0	19.0	19.0

- 1) Click the **WYE (Annual)** button
- 2) Click the **Append Row** button to add a row
- 3) Enter the following:

Guide Type Inguide or Overguide

OG Type Overguide type: New Initiative, Augment, Price or (#) unassigned.
You must use unassigned (#) if you selected inguide.

NASA Org The directorate or division the WYEs are requested from

Contract The contract ID the WYEs are associated with or UCONTRACT(n)
for unassigned contract

Vendor Name The name of the company the WYEs are employed by

Location The location of the WYEs (On-site or Off-site)

WYEs per Year Enter WYE requests for two previous years, the budget year and
four outyears



What goes in the Input Layout? (Cont.)

WYE (Annual) – Input Area

◀ Annual | Other Dir \$ (Annual) | **WYE (Annual)** | FTE (Phase) | FTE \$ (Phase) - Incremental | FTE \$ (Phase) - Cumulative | Travel \$ (Phase) | Travel \$ (Phase) ▶

Recompute | Check Bus. Rules

[Icons: Save, Copy, Paste, Print, etc.]

Guide Type	OG Type	NASA Org		Contract	Vendor ...	Location	WYE - Prior Year(s)	FY 2004 WYEs	FY 2005 WYEs	FY 2006 WYEs	FY 2007 WYEs
INGUIDE	#	21AS	Space Technology ...	UCONTRACT1	Unassi...	ONSITE	0.0	7.0	7.0	7.0	7.0
INGUIDE	#	21SF	Space Projects Divi...	UCONTRACT2	Unassi...	ONSITE	0.0	12.0	12.0	12.0	12.0
INGUIDE	OG Type	NASA Org	Total	Contract		Location	0.0	19.0	19.0	19.0	19.0
Guide Type	OG Type	NASA Org	Total	Contract		Location	0.0	19.0	19.0	19.0	19.0

- 4) Click the **Transfer Variables** button to sort the row of data you entered and total the input area
- 5) Click the **Recompute** button to transfer data from the input area to the output area
- 6) Repeat for all of the Organizations that you are responsible for
- 7) Click the **Save** button to save your data.



Where can I see the output?

WYE (Annual) – Output Layout

WYE (Annual) – Output Layout													
FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)	
Source	Detail	Guide Type	OG Type	NASA Org		Contract	Vendor Name	Location	FY 2004 WYEs	FY 2005 WYEs	FY 2006 WYEs	FY 2007 WYEs	FY 2008 WYEs
DIRECT	#	INGUIDE	#	21AS	Space Technology Di...	UCONTRACT1	Unassigned	ONSITE	7.0	7.0	7.0	7.0	7.0
DIRECT	#	INGUIDE	#	21SF	Space Projects Divisi...	UCONTRACT2	Unassigned	ONSITE	12.0	12.0	12.0	12.0	12.0
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	Contract		Location	19.0	19.0	19.0	19.0	19.0
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	Contract		Location	19.0	19.0	19.0	19.0	19.0
Source	Detail	Guide Type	OG Type	NASA Org	Total	Contract		Location	19.0	19.0	19.0	19.0	19.0

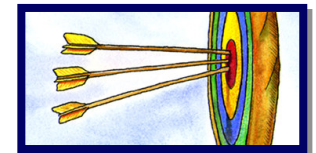
1) Click the **WYE (Annual) output button** to view the output area.

2) The following information is shown:

Source	The name of the Service Pool, G&A or Direct if planned yourself
Detail	The name of the Sub-pool
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
NASA Org	The directorate or division the WYEs are being requested for
Contract	The contract ID the WYEs are associated to
Vendor Name	The name of the company the WYEs are employed by
Location	The location of the WYEs (onsite or offsite)
FY 20XX WYEs	The number of requested WYEs.
Totals	The totals for all Organizations listed.

Requesting Annual Travel \$

- **Goal:** Request annual Travel \$ from Organizations by the Project WBS element
- **Why:** As part of the budget build-up, the project planning requester must determine the travel fund requirements needed for the WBS element task. Travel funding (formerly known as FS42) is managed through the Organizations, so the WBS element must cite the organization the travel funding is being requested from.

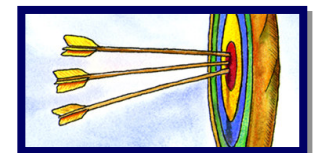




Requesting Annual Travel \$ (Cont.)

■ Steps for entering header data:

1. Log On
2. Open “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
3. Enter Header Data
4. Click the **Transfer Header Variables button**
5. Click the **Travel \$ (Annual) button**
6. Enter Input area data






What goes in the Input Layout? Checking for Travel \$ allocations

Travel \$ (Annual) – Input Area

◀ FTE (Annual) FTE (Annual) - Delta FTE \$ (Annual) **Travel \$ (Annual)** Travel \$ (Annual) - Delta SP Units (Annual) SP Units (Annual) - Delta SP \$ (A ▶

[Recompute] **[Prime (Req = Auth)]** [Check Bus. Rules]

Guide Type	OG Type	NASA Org		Travel \$ - Prior Year(s)	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$	Travel \$ -
INGUIDE	#	21AS	Space Technology Division	0.000	75.000	75.000	75.000	75.000	75.000	75.000	75.000	0
INGUIDE	#	21SF	Space Projects Division	0.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	0
INGUIDE	OG Type	NASA Org	Total	0.000	95.000	95.000	95.000	95.000	95.000	95.000	95.000	0
Guide Type	OG Type	NASA Org	Total	0.000	95.000	95.000	95.000	95.000	95.000	95.000	95.000	0

Note: Prior to beginning your planning and requesting of Travel \$, you can push the  button in order to prime your planning layout with the travel dollars allocated to your WBS element by the Project and Organization in the top-down planning process. This automated process is for your planning information. You can then continue to plan over these numbers or keep them.





What goes in the Input Layout?

Travel \$ (Annual) – Input Area

◀ FTE (Annual) FTE (Annual) - Delta FTE \$ (Annual) **Travel \$ (Annual)** Travel \$ (Annual) - Delta SP Units (Annual) SP Units (Annual) - Delta SP \$ (A ▶

Recompute Prime (Req = Auth) Check Bus. Rules

Guide Type	OG Type	NASA Org		Travel \$ - Prior Year(s)	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$	Travel \$ -
INGUIDE	#	21AS	Space Technology Division	0.000	75.000	75.000	75.000	75.000	75.000	75.000	75.000	0
INGUIDE	#	21SF	Space Projects Division	0.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	0
INGUIDE	OG Type	NASA Org	Total	0.000	95.000	95.000	95.000	95.000	95.000	95.000	95.000	0
Guide Type	OG Type	NASA Org	Total	0.000	95.000	95.000	95.000	95.000	95.000	95.000	95.000	0

- 1) Click the **Travel \$ (Annual)** button
- 2) Click the **Append Row** button to add a row
- 3) Enter the following:

Guide Type	Inguide or Overguide
OG Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide.
NASA Org	The directorate or division requesting Travel \$.
Travel \$ per Year	Enter Travel \$ requests for two previous years, the budget year and four outyears



What goes in the Input Layout? (Cont.)

Travel \$ (Annual) – Input Area

◀ FTE (Annual) FTE (Annual) - Delta FTE \$ (Annual) **Travel \$ (Annual)** Travel \$ (Annual) - Delta SP Units (Annual) SP Units (Annual) - Delta SP \$ (A) ▶

Recompute Prime (Req = Auth) Check Bus. Rules

Icons: Lock, Copy, Paste, Undo, Redo, Print, Save, Close

Guide Type	OG Type	NASA Org		Travel \$ - Prior Year(s)	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$	Travel \$ -
INGUIDE	#	21AS	Space Technology Division	0.000	75.000	75.000	75.000	75.000	75.000	75.000	75.000	0
INGUIDE	#	21SF	Space Projects Division	0.000	20.000	20.000	20.000	20.000	20.000	20.000	20.000	0
INGUIDE	OG Type	NASA Org	Total	0.000	95.000	95.000	95.000	95.000	95.000	95.000	95.000	0
Guide Type	OG Type	NASA Org	Total	0.000	95.000	95.000	95.000	95.000	95.000	95.000	95.000	0

- 4) Click the **Transfer Variables button** to sort the row of data you entered and total the input area
- 5) Click the **Recompute button** to transfer data from the input area to the output area.
- 6) Repeat for all of the Organizations that you are responsible for
- 7) Click the **Save button** to save your data.



Where can I see the output?

Travel \$ (Annual) – Output Layout

Travel \$ (Annual) – Output Layout													
FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)	
Source	Detail	Guide Type	OG Type	NASA Org		FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$	
DIRECT	#	INGUIDE	#	21AS	Space Technology Division	75.000	75.000	75.000	75.000	75.000	75.000	75.000	
DIRECT	#	INGUIDE	#	21SF	Space Projects Division	20.000	20.000	20.000	20.000	20.000	20.000	20.000	
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	95.000	95.000	95.000	95.000	95.000	95.000	95.000	
Source	Detail	Guide Type	OG Type	NASA Org	Total	95.000	95.000	95.000	95.000	95.000	95.000	95.000	

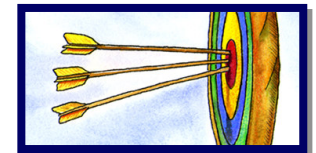
1) Click the **Travel \$ (Annual) output button** to view the output area.

2) The following information is shown:

Source	The name of the Service Pool, G&A or Direct if planned yourself
Detail	The name of the Sub-pool, or (#) if not applicable
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned
NASA Org	The directorate or division the Travel \$ are being requested from
FY 20XX \$	The actual dollars associated with Travel by Organization
Totals	The totals for all Organizations listed

Requesting Annual Service Pool Units

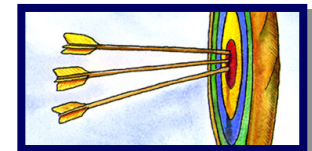
- **Goal:** Request annual Service Pool units by Organization from Service/Sub-Pools
- **Why:** As part of the budget build-up, the project planning requester must determine the amount of services required from the Service/Sub-pool for the WBS element task. The project planning requester can review the estimated units of service from the allocated and demand service/sub-pools.



Requesting Annual Service Pool Units (Cont.)

■ Steps for entering header data:

1. Log On
2. Open “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
3. Enter Header Data
4. Click the **Transfer Header Variables button**
5. Click the **SP Units (Annual) button**
6. Enter Input area data
7. Allocate service pool costs





What goes in the Input Layout? Checking for Service/Sub Pool Estimates

SP Units (Annual) – Input Area

FTE (Annual)	FTE (Annual) - Delta	FTE \$ (Annual)	Travel \$ (Annual)	Travel \$ (Annual) - Delta	SP Units (Annual)	SP Units (Annual) - Delta	SP \$ (A ▶)
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Recompute
Execute Allocation
Prime (Req=Est)
Refresh SP Rate
Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2004 Units	FY 2005 Units	FY 2006 Units	FY 2007 Units	FY 2008 Units	FY 2009 Units
INGUIDE	#	21	21AS	Space Tech...	F&RS	PROPERTY	PC	ASP	50.0	50.0	50.0	50.0	50.0	
INGUIDE	#	21	21AS	Space Tech...	S&E	ENG	HR	DSP	60.0	60.0	60.0	60.0	60.0	
INGUIDE	#	21	21SF	Space Proj...	F&RS	PROPERTY	PC	ASP	25.0	25.0	25.0	25.0	25.0	

Note: Prior to beginning your planning and requesting of Service Pool units you can push the Prime (Req=Est) button in order to prime your planning layout with the service/sub-pool units estimated for your WBS element and organization combination by the service/sub-pool managers. This automated process is for your planning information. You can then continue to plan over these numbers or keep them.





What goes in the Input Layout?

SP Units (Annual) – Input Area

◀ FTE (Annual) FTE (Annual) - Delta FTE \$ (Annual) Travel \$ (Annual) Travel \$ (Annual) - Delta **SP Units (Annual)** SP Units (Annual) - Delta SP \$ (A ▶

Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2004 Units	FY 2005 Units	FY 2006 Units	FY 2007 Units	FY 2008 Units	FY 2009 Units
INGUIDE	#	21	21AS	Space Tech...	F&RS	PROPERTY	PC	ASP	50.0	50.0	50.0	50.0	50.0	
INGUIDE	#	21	21AS	Space Tech...	S&E	ENG	HR	DSP	60.0	60.0	60.0	60.0	60.0	
INGUIDE	#	21	21SF	Space Proj...	F&RS	PROPERTY	PC	ASP	25.0	25.0	25.0	25.0	25.0	

- 1) Click the **SP Units (Annual)** button
- 2) Click the **Append Row** button to add a row
- 3) Enter the following:

Guide Type	Inguide or Overguide
OG Type	Overguide type: New Initiative, Augment, Price or (#) unassigned. You must use unassigned (#) if you selected inguide
BA	Business Area or Center that hosts the SP you are requesting use of
NASA Org	The directorate or division requesting Service Pool Units
Service Pool	The Service Pool you are requesting services from
Sub Pool	The SP Sub Pool you are requesting services from
FY 20XX Units	Enter requested SP Units for two previous years, the budget year and four outyears. SP Units are measured in different units depending on the type of SP usage requested (e.g. hours, square feet, headcount, etc.)



What goes in the Input Layout? (Cont.)

SP Units (Annual) – Input Area

◀ FTE (Annual) FTE (Annual) - Delta FTE \$ (Annual) Travel \$ (Annual) Travel \$ (Annual) - Delta SP Units (Annual) SP Units (Annual) - Delta SP \$ (A ▶

Recompute
 Execute Allocation
 Prime (Req=Est)
 Refresh SP Rate
 Check Bus. Rules

Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2004 Units	FY 2005 Units	FY 2006 Units	FY 2007 Units	FY 2008 Units	FY 2009 Units
INGUIDE	#	21	21AS	Space Tech...	F&RS	PROPERTY	PC	ASP	50.0	50.0	50.0	50.0	50.0	
INGUIDE	#	21	21AS	Space Tech...	S&E	ENG	HR	DSP	60.0	60.0	60.0	60.0	60.0	
INGUIDE	#	21	21SF	Space Proj...	F&RS	PROPERTY	PC	ASP	25.0	25.0	25.0	25.0	25.0	

- 4) Click the **Transfer Variables button** to sort the row of data you entered and total the input area
- 5) Click the **Recompute button** to transfer data from the input area to the output area
- 6) Click the **Refresh SP Rate** to bring in the newest Service Pool rates
- 7) Repeat for all of the Organizations you are responsible for
- 8) Click the **Save button** to save your data.



What goes in the Input Layout? Allocating Service Pool costs

SP Units (Annual) – Input Area

FTE (Annual)	FTE (Annual) - Delta	FTE \$ (Annual)	Travel \$ (Annual)	Travel \$ (Annual) - Delta	SP Units (Annual)	SP Units (Annual) - Delta	SP \$ (A)
--------------	----------------------	-----------------	--------------------	----------------------------	-------------------	---------------------------	-----------

Recompute
Execute Allocation
Prime (Req=Est)
Refresh SP Rate
Check Bus. Rules


Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2004 Units	FY 2005 Units	FY 2006 Units	FY 2007 Units	FY 2008 Units	FY 2009 Units
INGUIDE	#	21	21AS	Space Tech...	F&RS	PROPERTY	PC	ASP	50.0	50.0	50.0	50.0	50.0	
INGUIDE	#	21	21AS	Space Tech...	S&E	ENG	HR	DSP	60.0	60.0	60.0	60.0	60.0	
INGUIDE	#	21	21SF	Space Proj...	F&RS	PROPERTY	PC	ASP	25.0	25.0	25.0	25.0	25.0	

Note: After submitting your changes to version control, you need to click the Execute Allocation button in order to receive any allocation of service pool costs based upon your WBS element's subscription to a service pool. These costs are comprised of FTEs, FTE \$, Travel \$, Other Direct \$, and WYEs and are based on the percentage of the requested service pool's capacity being consumed by the service pool for which you are planning.





Where can I see the output?

SP Units and \$ (Annual) – Output Layout																		
FTE and \$ (Annual)			Travel \$ (Annual)			SP Units and \$ (Annual)			Other Dir \$ (Annual)			WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)		SP Units a ▶
	Source	Detail	Guide Type	OG Type	BA	NASA Org		Service pool	Sub-pool	UOM	SP Type	FY 2004 Units	FY 2004 \$	FY 2005 Units	FY 2005 \$	FY 2006 Units	FY	
	DIRECT	#	INGUIDE	#	21	21AS	Space Te...	F&RS	PROPERTY	PC	ASP	50.0	136.418	50.0	136.519	50.0	1	
	DIRECT	#	INGUIDE	#	21	21AS	Space Te...	S&E	ENG	HR	DSP	60.0	0.000	60.0	0.000	60.0		
	DIRECT	#	INGUIDE	#	21	21SF	Space Pr...	F&RS	PROPERTY	PC	ASP	25.0	68.209	25.0	68.260	25.0		
	DIRECT	#	INGUIDE	OG Type	BA	NASA Org	Total	Service pool	Sub-pool			135.0	204.627	135.0	204.779	135.0	2	
	DIRECT	Detail	Guide Type	OG Type	BA	NASA Org	Total	Service pool	Sub-pool			135.0	204.627	135.0	204.779	135.0	2	
	Source	Detail	Guide Type	OG Type	BA	NASA Org	Total	Service pool	Sub-pool			135.0	204.627	135.0	204.779	135.0	2	

1) Click the **SP Units and \$ (Annual) output** button to view the output area.

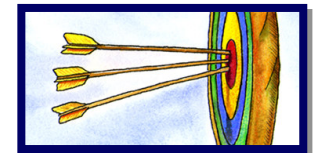
2) The following information is shown:

Source	The name of the Service Pool or Direct if planned yourself
Detail	The name of the Sub-pool
Guide Type	Inguides or Overguides
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned.
BA	Business Area or Center
NASA Org	The directorate or division the Service Pool units are being requested for
Service Pool	The Service Pool you are requesting services from
Sub Pool	The SP Sub Pool you are requesting services from
UOM	Unit of Measure for the requested SP
SP Type	ASP (Allocated Service Pool) or DSP (Demand Service Pool)
FY 20XX Units	The number of SP Units requested
FY 20XX \$	The dollars associated with the SP (equal to SP Units X Rate).
Totals	The totals for all Organizations listed



Requesting Annual Other Direct \$

- **Goal:** Request annual Other Direct \$ by Organization
- **Why:** As part of the budget build-up, the project planning requester must determine the amount of procurement funding (Other Direct \$) each Organization has to execute the WBS element's task. This amount is usually determined from the Program/Project Full Cost guidelines after considering the costs from all the full cost components.

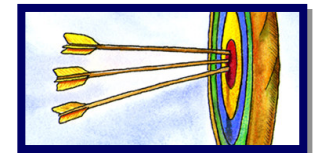




Requesting Annual Other Direct \$ (Cont.)

■ Steps for entering header data:

1. Log On
2. Open “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
3. Enter Header Data
4. Click the **Transfer Header Variables button**
5. Click the **Other Direct \$ (Annual) button**
6. Enter Input area data





What goes in the Input Layout?

Other Direct \$ (Annual) – Input Area

Annual) - Delta SP \$ (Annual) **Other Dir \$ (Annual)** WYE (Annual) FTE (Phase) FTE \$ (Phase) - Incremental FTE \$ (Phase) - Cumulative Travel \$ (

Recompute Check Bus. Rules

[Icons: Save, Print, Copy, Paste, Undo, Redo, Find, Help]

Guide Type	OG Type	NASA Org		FS	Contract	Vendor N...	CI	\$ - Prior Yea...	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$
INGUIDE	#	21AS	Space Te...	29	UCONTRACT1	Unassign...	2600	7,800.000	4,750.000	4,750.000	4,500.000	4,500.000	4,500.000	4,500.000
INGUIDE	#	21SF	Space Pr...	29	UCONTRACT2	Unassign...	2600	2,800.000	1,300.000	1,300.000	1,300.000	1,150.000	1,150.000	1,150.000
INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000
Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000

- 1) Click the **Other Dir \$ (Annual)** button
- 2) Click the **Append Row** button to add a row.
- 3) Enter the following:

Guide Type

Inguide or Overguide

OG Type

Overguide type: New Initiative, Augment, Price or (#) unassigned.
You must use unassigned (#) if you selected inguide

NASA Org

The directorate or division requesting Other Direct \$

FS

Fund Source – The Fund Source that the project WBS is associated with

Contract

The contract ID the WYEs are associated to, or UCONTRACT(n) for unassigned

CI

Commitment Item

Prior Year(s) \$

The sum of all prior year costs

FY 20XX \$

Enter Other Dollar requests for two previous years, the budget year and four outyears.



What goes in the Input Layout? (Cont.)

Other Direct \$ (Annual) – Input Area

Annual - Delta SP \$ (Annual) **Other Dir \$ (Annual)** WYE (Annual) FTE (Phase) FTE \$ (Phase) - Incremental FTE \$ (Phase) - Cumulative Travel \$ (


Recompute Check Bus. Rules

Guide Type	OG Type	NASA Org		FS	Contract	Vendor N...	CI	\$ - Prior Yea...	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$
INGUIDE	#	21AS	Space Te...	29	UCONTRACT1	Unassign...	2600	7,800.000	4,750.000	4,750.000	4,500.000	4,500.000	4,500.000	4,500.000
INGUIDE	#	21SF	Space Pr...	29	UCONTRACT2	Unassign...	2600	2,800.000	1,300.000	1,300.000	1,300.000	1,150.000	1,150.000	1,150.000
INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000
Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000

- 4) Click the **Transfer Variables** button to sort the row of data that you entered and total the input area
- 5) Click the **Recompute** button to transfer data from the input area to the output area.
- 6) Repeat for all of the organizations that you are responsible for.
- 7) Click the **Save** button to save your data.



Where can I see the output?

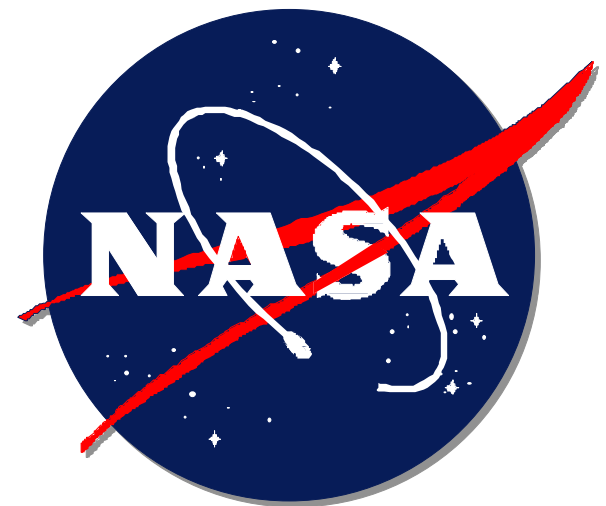
Other Direct \$ (Annual) – Output Layout																	
FTE and \$ (Annual)			Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)			WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)		SP Units a ▶	
	Source	Detail	Guide Type	OG Type	NASA Org		FS	Contract	Vendor ...	CI	Prior Year(s) \$	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$
	DIRECT	#	INGUIDE	#	21AS	Space Te...	29	UCONTRACT1	Unassi...	2600	7,800.000	4,750.000	4,750.000	4,500.000	4,500.000	4,500.000	4,500.000
	DIRECT	#	INGUIDE	#	21SF	Space Pr...	29	UCONTRACT2	Unassi...	2600	2,800.000	1,300.000	1,300.000	1,300.000	1,150.000	1,150.000	1,150.000
	DIRECT	#	INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000
	DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000
	Source	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	5,800.000	5,650.000	5,650.000	5,650.000

1) Click the **Other Dir \$ (Annual)** output button to view the output area.

2) The following information is shown:

Source	The name of the Service Pool, G&A, or Direct if planned yourself
Detail	The name of the Service Sub-pool or (#) if not applicable
Guide Type	Inguide or Overguide
OG Type	The type of Overguide: New Initiative, Augment, Price, and (#) Unassigned
NASA Org	The directorate or division the Other Direct \$ is budgeted for
FS	Fund Source
Contract	The contract ID the Other Direct \$ is planned for
Vendor Name	The name of the company on the contract
CI	Commitment Item
Prior Year(s) \$	The sum of all prior year costs
FY 20XX \$	The actual amount of requested Direct Other \$
Totals	The totals for all Organizations listed

Budget Formulation: Corporate G&A Planning





Overview: Corporate G&A Planning

- Based upon recent Full Cost decisions, Corporate G&A will utilize a different cost collector to establish Corporate G&A requirements
- Corporate G&A will be planned in the Project Planning folders. Corporate G&A planners need to review all Project Planning training materials
- Modifications to Corporate G&A Allocation functionality will be implemented for the February release
- While no changes have been made to Center G&A planning, Center G&A Allocation will be modified as a result of Corporate G&A

The roles in the class and how they differ

■ Corporate G&A Authorizer

- Distributes Corporate G&A authorizations from Project Definition to WBS element level.
- Has access to the **Projects – Secondary FTE Distribution** and **Projects – Secondary Travel Dollar Distribution** folders.

■ Corporate G&A Requestor

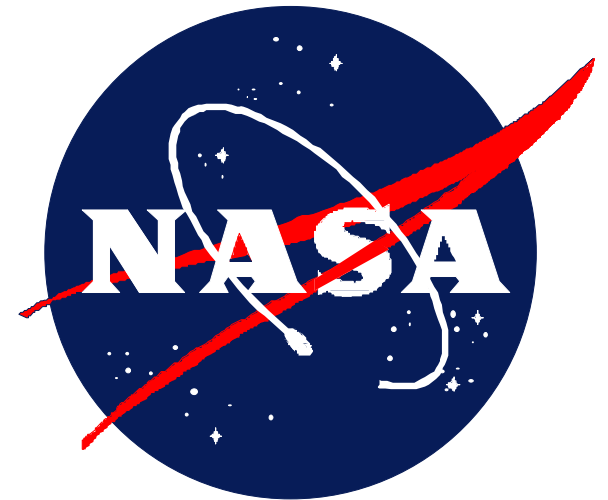
- Requests Corporate G&A (at WBS element level) for FTEs, Travel, Service Pools, Other Direct Dollars and WYEs.
- Has access to the **Proj Plan (FTE, Travel, SP, Other Direct \$, WYE)** and **PP – Phasing (Other Direct \$)** folders.

■ Corporate G&A Administrator

- Allocates Corporate G&A to Projects.
- This process has not been implemented for BF Release 5.

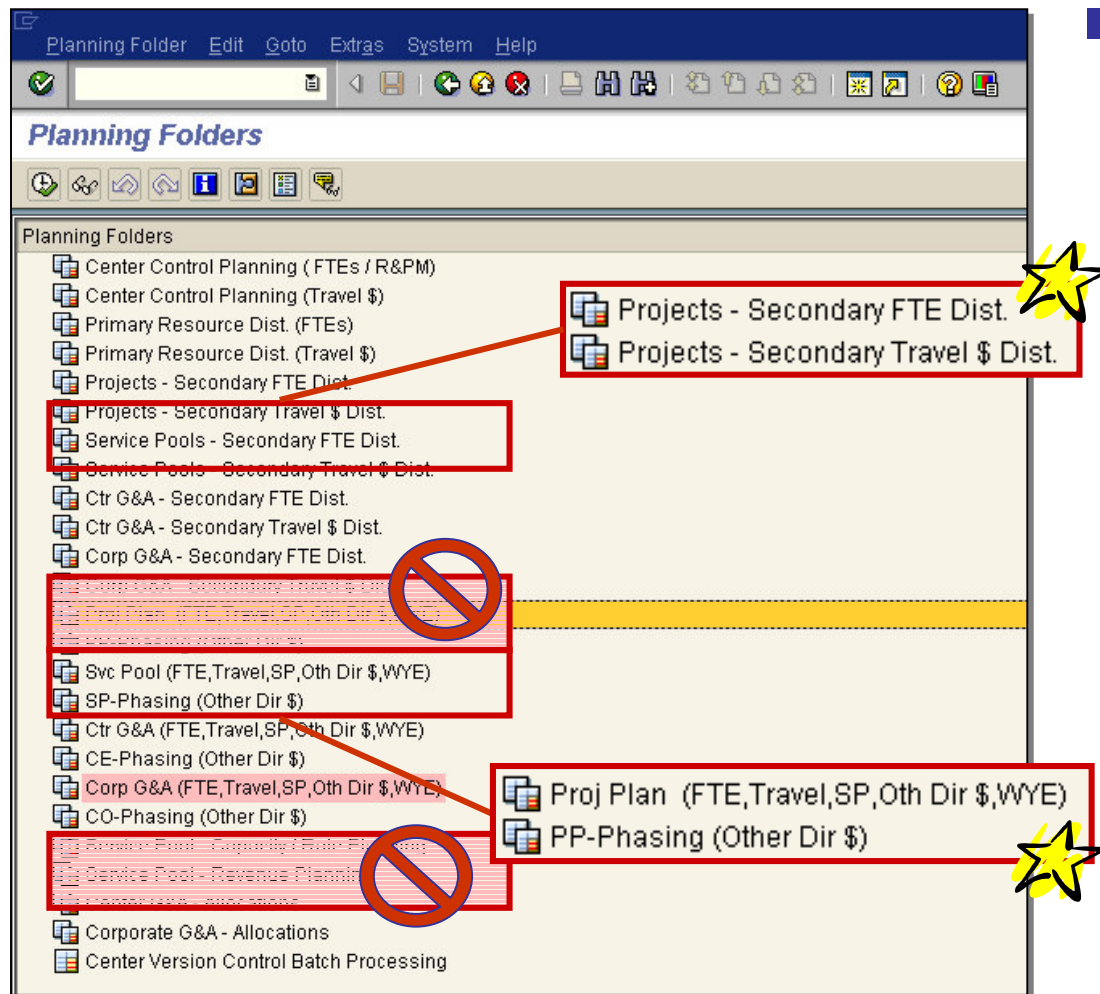


Corporate G&A Idiosyncrasies





Planning Folder for Corporate G&A

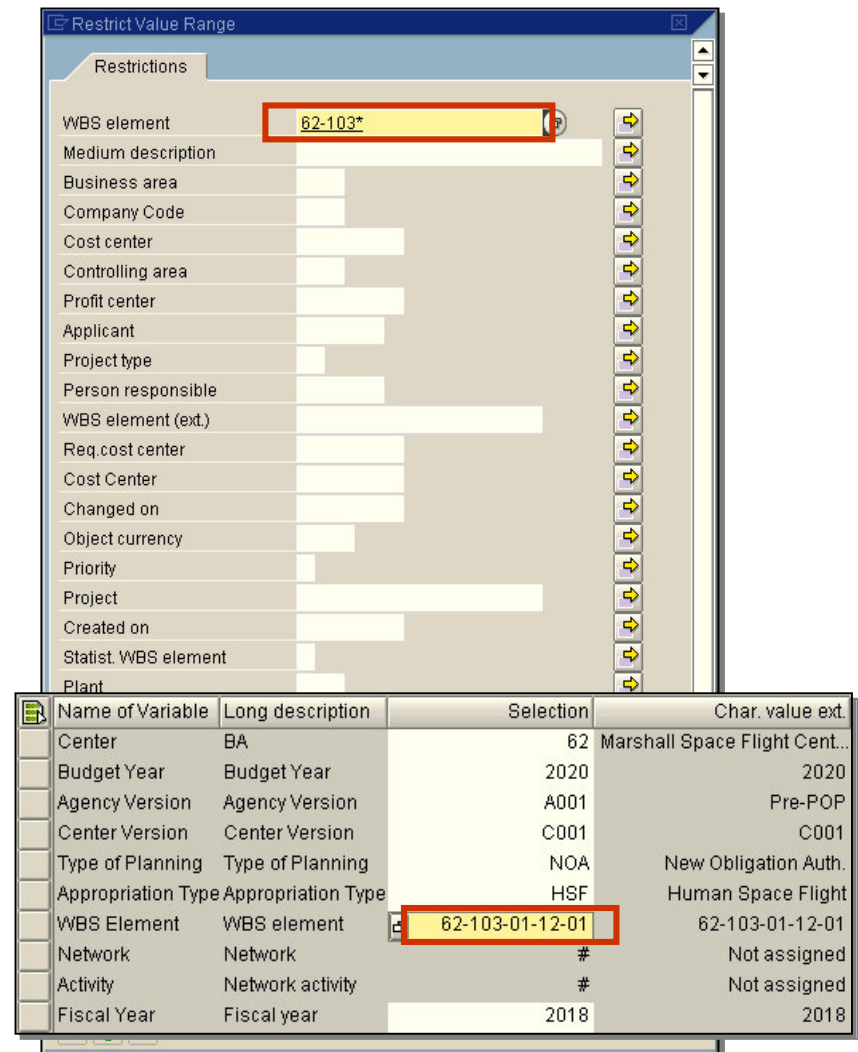


■ Plan Corporate G&A in the PP folders:

- **Projects – Secondary FTE Dist.**
- **Projects – Secondary Travel \$ Dist.**
- **Proj Plan (FTE, Travel, SP, Oth Dir \$, WYE)**
- **PP – Phasing (Other Dir \$)**

Corporate G&A WBS Elements

- Corporate G&A WBS elements have unique attributes
 - All Corporate G&A WBS elements are numbered either **BA-103-XX...** or **BA-104-XX...**
 - For example, **62-103-01-12-01** is a Corporate G&A WBS element
- Corporate G&A Planners will be restricted to WBSes of this type



The screenshot shows the 'Restrict Value Range' dialog box in SAP. The 'Restrictions' tab is active. The 'WBS element' field is highlighted with a red box and contains the value '62-103*'. Below the dialog box, a table displays the selected values for various variables.

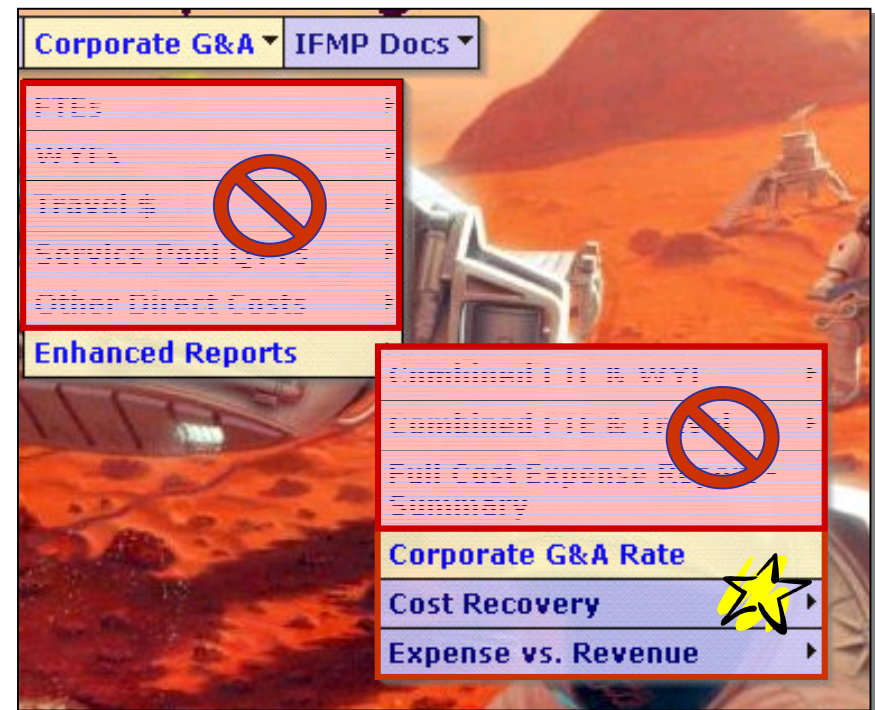
Name of Variable	Long description	Selection	Char. value ext.
Center	BA	62	Marshall Space Flight Cent...
Budget Year	Budget Year	2020	2020
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Type of Planning	Type of Planning	NOA	New Obligation Auth.
Appropriation Type	Appropriation Type	HSF	Human Space Flight
WBS Element	WBS element	62-103-01-12-01	62-103-01-12-01
Network	Network	#	Not assigned
Activity	Network activity	#	Not assigned
Fiscal Year	Fiscal year	2018	2018

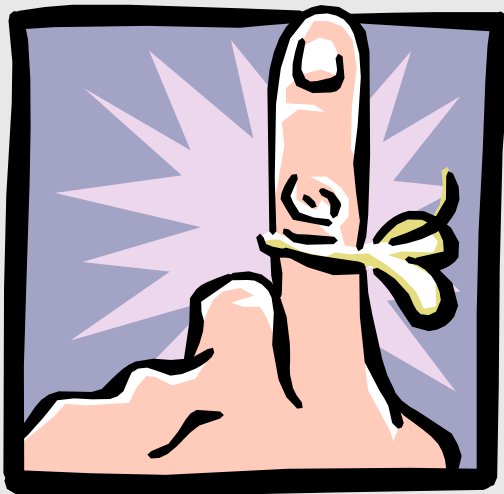
Corporate G&A Reports

- Some Corporate G&A data is available through the Corporate G&A reports menu
- Other Corporate G&A report titles will remain in the menu bar, but can not be used to retrieve data

Corporate G&A Reports

- Corporate G&A Rate
- Cost Recovery – Annual
- Cost Recovery – Phased
- Expense vs. Revenue – Annual
- Expense vs. Revenue – Version Comparison





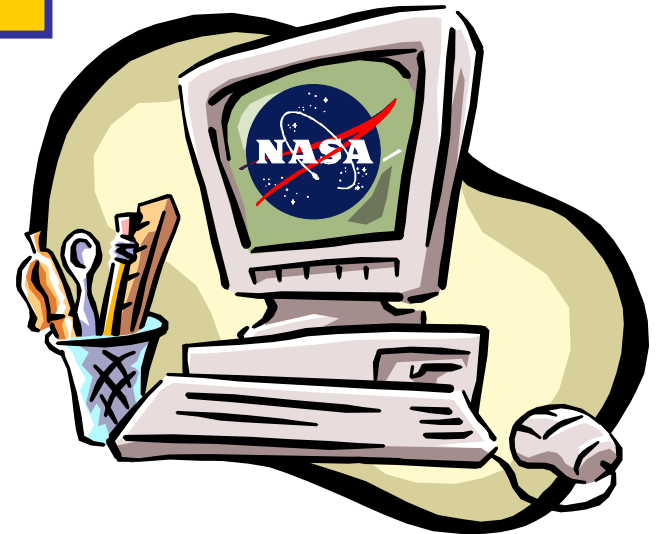
- Annual planning, phasing and reporting for Corporate G&A will mimic Project Planning. Please see Project Planning course materials for detailed procedures.
- Corporate G&A Allocation modifications will be implemented in the February release.

Demonstrations and Exercises

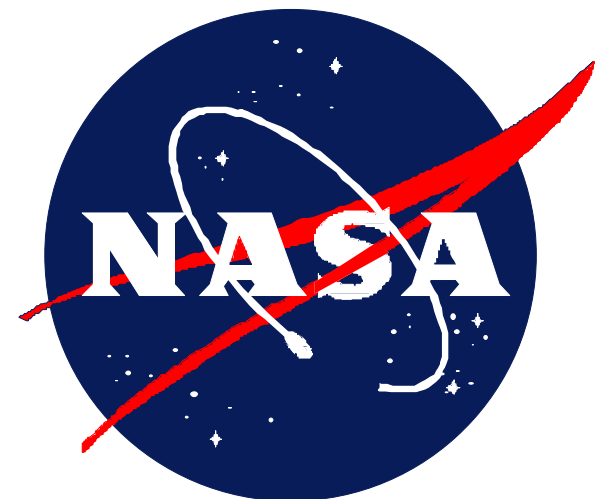
- Now, let's get our hands on the system.



Using your exercise handout, go to
***Project Planning & Corporate G&A
Requestor Exercise: (steps 1-39)***



Reviewing Center G&A Allocations & Other Full Cost Allocations





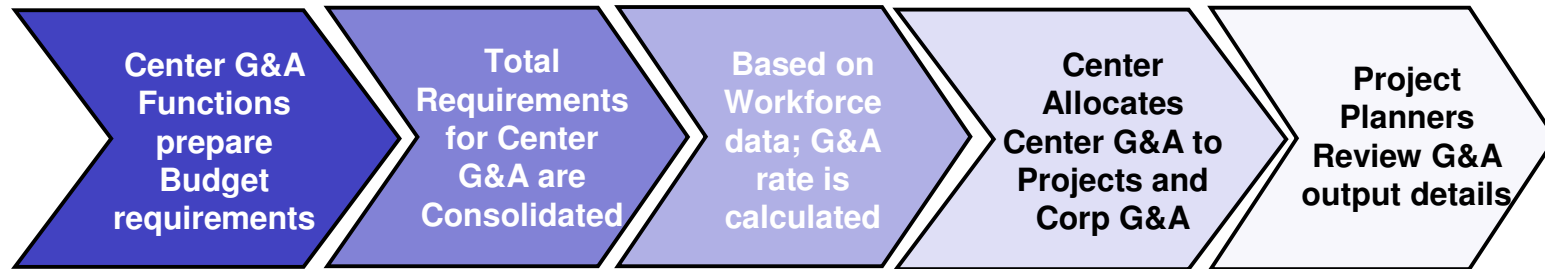
Overview: Center G&A Allocations

This section will focus on the following:

- Entering Header Data
- Reviewing G&A Allocation output views
- Reviewing corresponding reports



Process Flow: Center G&A Allocations



Planning Folders

- Center Control Planning (FTEs / R&PM)
- Center Control Planning (Travel \$)
- Primary Resource Dist. (FTEs)
- Primary Resource Dist. (Travel \$)
- Projects - Secondary FTE Dist.
- Projects - Secondary Travel \$ Dist.
- Service Pools - Secondary FTE Dist.
- Service Pools - Secondary Travel \$ Dist.
- Ctr G&A - Secondary FTE Dist.
- Ctr G&A - Secondary Travel \$ Dist.
- Corp G&A - Secondary FTE Dist.
- Corp G&A - Secondary Travel \$ Dist.
- Proj Plan (FTE,Travel,SP,Oth Dir \$,WYE)
- PP-Phasing (Other Dir \$)
- Svc Pool (FTE,Travel,SP,Oth Dir \$,WYE)
- SP-Phasing (Other Dir \$)
- Ctr G&A (FTE,Travel,SP,Oth Dir \$,WYE)
- CE-Phasing (Other Dir \$)
- Corp G&A (FTE,Travel,SP,Oth Dir \$,WYE)
- CO-Phasing (Other Dir \$)
- Service Pool - Capacity / Rate Planning
- Service Pool - Revenue Planning
- Center G&A - Allocations
- Corporate G&A - Allocations

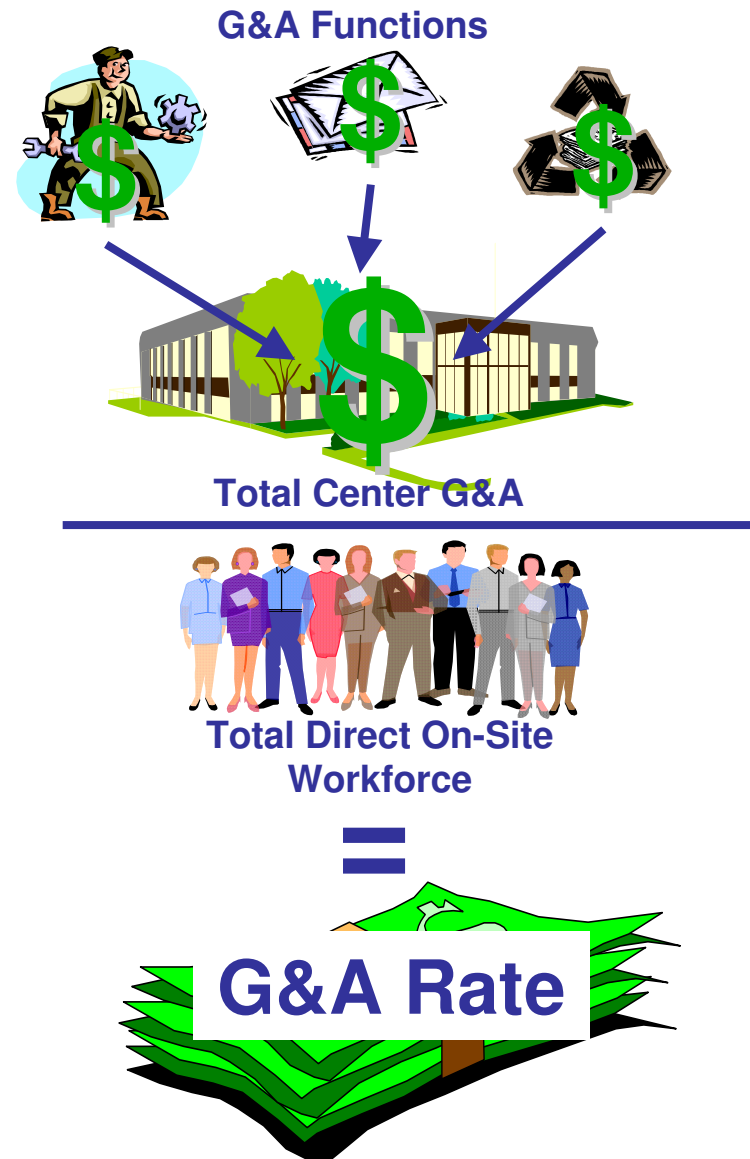
In the **Center G&A – Allocation** folder, the Center CFO performs Center G&A allocations back to Projects.

In the **Pro Plan (FTE, Travel, SP, Oth Dir \$, WYE)** the Project Planning Requester can review the Center G&A allocated to the project WBS.

Why: Project planners contribute a part of the Projects' budget towards funding Center G&A functions from which they benefit. The assessment is based on direct on-site Workforce and can be reviewed by the Project Planner to understand the Full Cost requirements of the project.

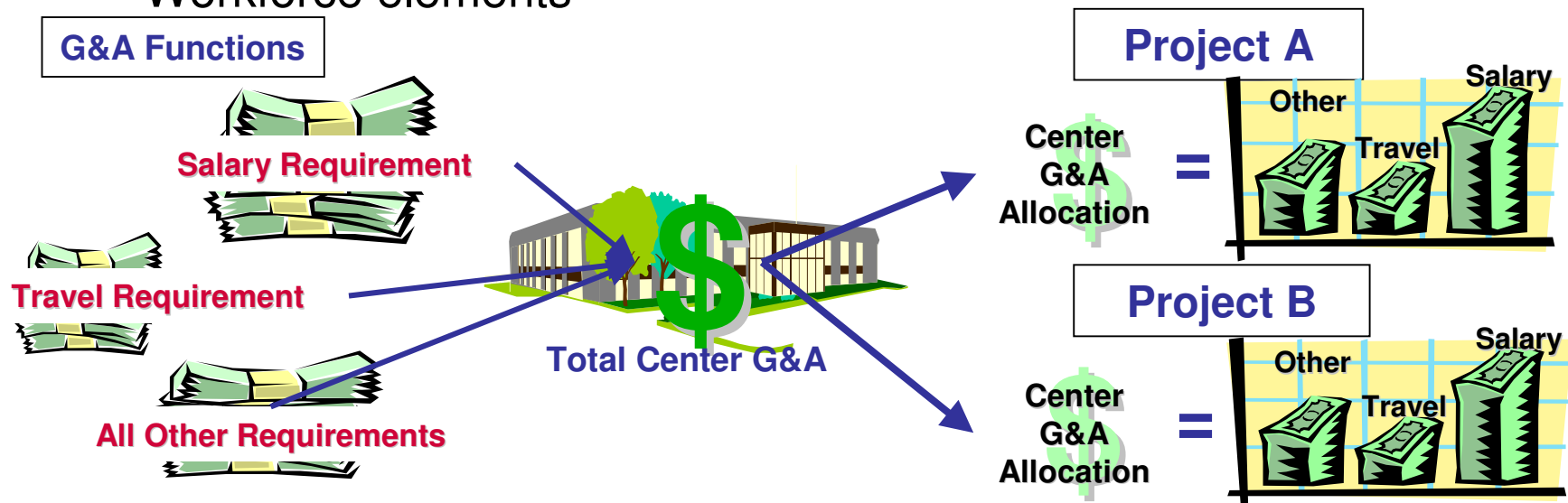
How is the Center G&A Rate Calculated?

- **Step 1:** All Center G&A Functions submit requirements in Full Cost
- **Step 2:** As the numerator, the functions' requirements are consolidated for a Total G&A requirement for the Center
- **Step 3:** As the divisor, the Center's Total Direct On-Site Workforce is consolidated
 - Direct On-Site Workforce includes:
 - ↓ Project FTEs and WYEs
 - ↓ Service Pool FTEs and WYEs benefiting Projects based on its service pool utilization
- **Step 4:** The G&A rate is developed by dividing the Center's Total G&A requirement by the Center's Total Direct On-Site Workforce
- **Step 5:** Center G&A is allocated to the Project by multiplying the Center G&A rate with the Project's Direct On-Site Workforce



Understanding the Allocation

- In Full Cost, there are five elements of planning
 - Salary Funding (formerly known as FS41\$)
 - Travel Funding (formerly known as FS42 \$)
 - All Other Funding (Other Direct \$ - Procurement)
 - Civil Servant Workforce (FTEs)
 - Contractor Workforce (WYEs)
- In order to maintain data integrity, the Allocation will be done for the Total Dollar amount (a composite of the 3 funding elements) as well as separately in 3 types of Funding elements and the 2 Workforce elements





What Does the Center G&A Administrator do?

Center G&A Administrator - Project Allocation Worksheet

Name	Descriptn	Selection	Char. value ext.
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2004	2004

Refresh G&A Costs Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore

Project Allocation Worksheet Corp G&A Allocation Worksheet Center G&A Total \$ (Summary) Center G&A Total \$ (Detail) Center G&A FTE (Detail)

Recompute Deltas Reset Ctr G&A \$ Distrib @ UD Execute Ctr G&A Allocation

Project Definition		Project Total OSWF	Project % of Total	Ctr G&A \$ Distrib @ 100%	Ctr G&A \$ Distrib @ UD	Ctr G&A UD Distrib Delta
21-200-10	21-200-10	75.0	75.26	3,981.499	3,981.499	0.000
21-721-10	21-721-10	24.6	24.74	1,308.501	1,308.501	0.000
Project Definition	Total	99.6	100.00	5,290.000	5,290.000	0.000

Project OSWF (Summary) Project (Detail) Project Allocation (Detail) Corp G&A OSWF (Summary) Corp G&A (Detail) Corp G&A Allocation (Detail)

Project Definition		Project Total OSWF	Project % of Total	Ctr G&A \$ Distrib @ 100%	Ctr G&A \$ Distrib @ UD
21-721-10	21-721-10	24.6	24.74	1,308.501	1,308.501
Project Definition	Total	45.6	54.0	99.6	100.00

- The Center G&A Administrator has a planning folder in which the Total On-Site Workforce (OSWF) can be reviewed
- Based on the OSWF and the G&A rate, the Center G&A Administrator allocates Center G&A to the Projects



Center G&A Allocation Checklist

- **Goal:** Review planning steps required before the Center G&A Allocation can occur
- **Why:** Because budget planning is an integrated process, there are dependencies among different planning elements. The system logic is built to comply with those dependencies, therefore the project planning requester must ensure all the steps are fulfilled in order to view the Center G&A Allocation

Center G&A Allocation Checklist

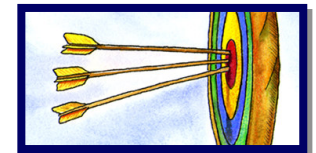
■ Checklist for Project Planning Requesters:

1. Plan Project WBS element's FTEs
2. Plan Project WBS element's WYEs
3. Plan Service/Sub-Pool unit subscription
4. Execute Service/Sub-Pool allocation
5. Release planning information to DRAFT Version & Save
 - This allows the planning data to be set to move to Final Version
6. Release planning information to Final Version & Save
 - This allows the Center G&A Allocation Administrator to include the Project's Direct On-site Workforce in the rate calculation
7. Exit out of planning folder
8. Ensure Center G&A Allocation Administrator has executed the allocation
 - The Center G&A Allocation is a push down process in the Budget Formulation system. Unless the Center G&A Administrator executes the "allocation," the information will not be visible to the Project Planning Requester.



Enter Header Data

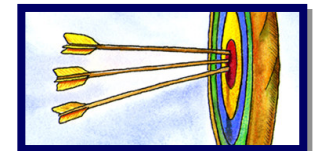
- **Goal:** Enter the appropriate characteristics in the Header Area to define the data you want to plan
- **Why:** All planning data entered into the system is categorized and stored based on the Header Data combination



Enter Header Data (Cont.)

■ Steps for entering header data:

1. Log On
2. Open the “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
3. Enter Header Data





Project Planning (FTE, Travel, SP, Other Dir \$, WYE) Folder

Project Plan (FTE, Travel, SP, Other Dir \$, WYE) Requester – Header Layout

Name of Variable	Long description	Selection	Characteristic Value Ext. Display	Selection	CharValExt
Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2006	2006		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Type of Planning	Type of Planning	NOA	New Obligation Auth.		
Appropriation Type	Appropriation Type	SAT	Science and Tech		
WBS Element	WBS element	21-721-10-	Systems Engineering/architecture		
Network	Network	#	Not assigned		
Activity	Network activity	#	Not assigned		
Fiscal Year	Fiscal year	2004	2004		

Name of Variable	Long description	Selection	Characteristic Value Ext. Display
Center	BA	21	Ames Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Type of Planning	Type of Planning	NOA	New Obligation Auth.
Appropriation Type	Appropriation Type	SAT	Science and Tech
WBS Element	WBS element	21-721-10-	Systems Engineering/architecture
Network	Network	#	Not assigned
Activity	Network activity	#	Not assigned
Fiscal Year	Fiscal year	2004	2004

Header Data

Annual - Delta SP \$ (A)

Level \$ (Phase) SP Units a

FY 2006 \$ FY 2007 FTEs

0.000 5.0

0.000 5.0



What goes in the Header Area?

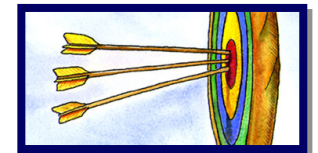
Header Area				
	Name of Variable	Long description	Selection	Characteristic Value Ext. Display
<input type="checkbox"/>	Center	BA	21	Ames Research Center
<input type="checkbox"/>	Budget Year	Budget Year	2006	2006
<input type="checkbox"/>	Agency Version	Agency Version	A001	Pre-POP
<input type="checkbox"/>	Center Version	Center Version	C001	C001
<input type="checkbox"/>	Type of Planning	Type of Planning	NOA	New Obligation Auth.
<input type="checkbox"/>	Appropriation Type	Appropriation Type	SAT	Science and Tech
<input type="checkbox"/>	WBS Element	WBS element	21-721-10-	Systems Engineering/architecture
<input type="checkbox"/>	Network	Network	#	Not assigned
<input type="checkbox"/>	Activity	Network activity	#	Not assigned
<input type="checkbox"/>	Fiscal Year	Fiscal year	2004	2004

- Enter the following in the Header Area to define the data that you want to plan:

Center	The two-digit Center number
Budget Year	The year you are planning
Agency Version	The Agency Version you are working in (A001-A006)
Center Version	The Center Version you are working in (C001-C005)
Type of Planning	The type of Budget Plan (NOA or COST)
Appropriation Type	The appropriation the Project belongs to (SAT or HSF)
WBS Element	The WBS Element you are planning for
Network	The Network you are planning for (# - unassigned)
Network Activity	The Network activity you are planning for (# - unassigned)
Fiscal Year	The fiscal year you are working in (Budget Year -2)
- Click the **Transfer Variables button** to set the data you want to plan.

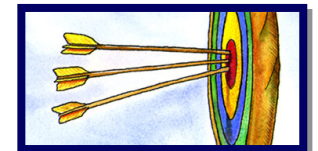
Reviewing the Allocation

- **Goal:** Review the allocation of Center G&A by the different elements of planning in the output section
- **Why:** The allocation of G&A occurs by the elements of full cost planning, therefore you must look at each element in the output section to see the components of the total G&A allocation. The allocation is identified by the source column citing “CTR” to represent Center G&A.



Reviewing the Allocation (Cont.)

- **Steps for reviewing the Center G&A Allocation:**
 1. Log On
 2. Open the “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
 3. Enter Header Data
 4. Select different planning elements in the output section
 5. Look for the source column with the title CTR



What is the Source Column in the Output Section?

- **Source:** It indicates the originator of the planning element and its associated cost
 - **DIRECT:** Data planned directly by the project planning requester
 - **CTR:** Data from Center G&A Allocation
 - **CORP:** Data from Corporate G&A Allocation
 - **F&RS:** Data from Facilities and Related Service Pool
 - **S&E:** Data from Science and Engineering Service Pool
 - **IT:** Data from Information Technology Service Pool
 - **FAB:** Data from Fabrication Service Pool
 - **WT:** Data from Wind Tunnel Service Pool
 - **TEST:** Data from Test Services Service Pool

Source	Detail	Guide Type	OG Type	NASA Org		LC	FY 2004 FTEs	FY 2004 \$	FY 2005 FTEs	FY 2005 \$	FY
CTR	#	INGUIDE	#	21AS	Space Technology ...	#	2.7	246.245	0.0	0.000	
CTR	#	INGUIDE	#	21AS	Space Technology ...	#	2.5	233.621	0.0	0.000	
CTR	#	INGUIDE	#	21AS	Space Technology ...	LC	5.2	479.866	0.0	0.000	
CTR	Detail	Guide Type	OG Type	NASA Org	Total	LC	5.2	479.866	0.0	0.000	
DIRECT	#	INGUIDE	#	21AS	Space Technology ...	#	5.0	625.000	5.0	640.000	
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	
F&RS	PROPERTY	INGUIDE	#	21AS	Space Technology ...	#	0.0	2.103	0.0	2.154	
F&RS	PROPERTY	INGUIDE	OG Type	NASA Org	Total	LC	0.0	2.103	0.0	2.154	
F&RS	Detail	Guide Type	OG Type	NASA Org	Total	LC	0.0	2.103	0.0	2.154	



Reviewing the Other Direct \$ Allocation

Other Direct \$ (Annual) – Output Area													
FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)	
Source	Detail	Guide Type	OG Type	NASA Org		FS	Contract	Vendor Name	CI	Prior Year(s) \$	FY 2004 \$	FY 2005 \$	
CTR	#	INGUIDE	#	21AS	Space Technology Division	#	#	#	#	0.000	418.870	0.000	
CTR	#	INGUIDE	#	21SF	Space Projects Division	#	#	#	#	0.000	397.397	0.000	
CTR	#	INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	0.000	816.267	0.000	
CTR	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	0.000	816.267	0.000	
DIRECT	#	INGUIDE	#	21AS	Space Technology Division	29	UCONTRACT1	Unassigned	2600	7,800.000	4,750.000	4,750.000	
DIRECT	#	INGUIDE	#	21SF	Space Projects Division	29	UCONTRACT2	Unassigned	2600	2,800.000	1,300.000	1,300.000	
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,050.000	6,050.000	
F&RS	PROPERTY	INGUIDE	#	21AS	Space Technology Division	#	#	#	#	0.000	6.010	6.010	
F&RS	PROPERTY	INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	0.000	6.010	6.010	
F&RS	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	0.000	6.010	6.010	
S&E	ENG	INGUIDE	#	21AS	Space Technology Division	#	#	#	#	0.000	0.105	0.105	
S&E	ENG	INGUIDE	OG Type	NASA Org	Total	FS	Contract		CI	0.000	0.105	0.105	
S&E	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	0.000	0.105	0.105	
Source	Detail	Guide Type	OG Type	NASA Org	Total	FS	Contract		CI	10,600.000	6,872.382	6,056.115	

1. Click on the **Other Direct \$ (Annual)** button in the output area
2. Look for the **Source Column**
3. Review the allocations from different sources



Reviewing the Travel \$ Allocation

Travel \$ (Annual) – Output Area												
FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)
Source	Detail	Guide Type	OG Type	NASA Org		FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$	FY 2010 \$
CTR	#	INGUIDE	#	21AS	Space Technology Division	6.347	0.000	0.000	0.000	0.000	0.000	0.000
CTR	#	INGUIDE	#	21SF	Space Projects Division	6.021	0.000	0.000	0.000	0.000	0.000	0.000
CTR	Detail	Guide Type	OG Type	NASA Org	Total	12.368	0.000	0.000	0.000	0.000	0.000	0.000
DIRECT	#	INGUIDE	#	21AS	Space Technology Division	75.000	75.000	75.000	75.000	75.000	75.000	75.000
DIRECT	#	INGUIDE	#	21SF	Space Projects Division	20.000	20.000	20.000	20.000	20.000	20.000	20.000
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	95.000	95.000	95.000	95.000	95.000	95.000	95.000
F&RS	PROPERTY	INGUIDE	#	21AS	Space Technology Division	60.096	60.096	60.096	60.096	60.096	60.096	60.096
F&RS	Detail	Guide Type	OG Type	NASA Org	Total	60.096	60.096	60.096	60.096	60.096	60.096	60.096
S&E	ENG	INGUIDE	#	21AS	Space Technology Division	0.421	0.421	0.421	0.421	0.421	0.421	0.421
S&E	Detail	Guide Type	OG Type	NASA Org	Total	0.421	0.421	0.421	0.421	0.421	0.421	0.421
Source	Detail	Guide Type	OG Type	NASA Org	Total	167.885	155.517	155.517	155.517	155.517	155.517	155.517

1. Click on the **Travel \$ (Annual)** button in the output area
2. Look for the **Source Column**
3. Review the allocations from different sources



Reviewing the FTE and Associated Salary \$ Allocation


FTE and \$ (Annual) – Output Area

FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)	
<div></div>													
Source	Detail	Guide Type	OG Type	NASA Org		LC	FY 2004 FTEs	FY 2004 \$	FY 2005 FTEs	FY 2005 \$	FY 2006 FTEs	FY 2006 \$	
CTR	#	INGUIDE	#	21AS	Space Technology ...	#	2.7	246.245	0.0	0.000	0.0	0.000	
CTR	#	INGUIDE	#	21SF	Space Projects Divi...	#	2.5	233.621	0.0	0.000	0.0	0.000	
CTR	#	INGUIDE	OG Type	NASA Org	Total	LC	5.2	479.866	0.0	0.000	0.0	0.000	
CTR	Detail	Guide Type	OG Type	NASA Org	Total	LC	5.2	479.866	0.0	0.000	0.0	0.000	
DIRECT	#	INGUIDE	#	21AS	Space Technology ...	#	5.0	625.000	5.0	640.000	5.0	640.000	
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	5.0	640.000	
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	LC	5.0	625.000	5.0	640.000	5.0	640.000	
F&RS	PROPERTY	INGUIDE	#	21AS	Space Technology ...	#	0.0	2.103	0.0	2.154	0.0	2.154	
F&RS	PROPERTY	INGUIDE	OG Type	NASA Org	Total	LC	0.0	2.103	0.0	2.154	0.0	2.154	
F&RS	Detail	Guide Type	OG Type	NASA Org	Total	LC	0.0	2.103	0.0	2.154	0.0	2.154	
S&E	ENG	INGUIDE	#	21AS	Space Technology ...	#	0.6	78.947	0.6	80.842	0.6	80.842	
S&E	ENG	INGUIDE	OG Type	NASA Org	Total	LC	0.6	78.947	0.6	80.842	0.6	80.842	
S&E	Detail	Guide Type	OG Type	NASA Org	Total	LC	0.6	78.947	0.6	80.842	0.6	80.842	
Source	Detail	Guide Type	OG Type	NASA Org	Total	LC	10.8	1,185.917	5.6	722.996	5.6	722.996	

1. Click on the **FTE and \$ (Annual)** button in the output area
2. Look for the **Source Column**
3. Review the allocations from different sources

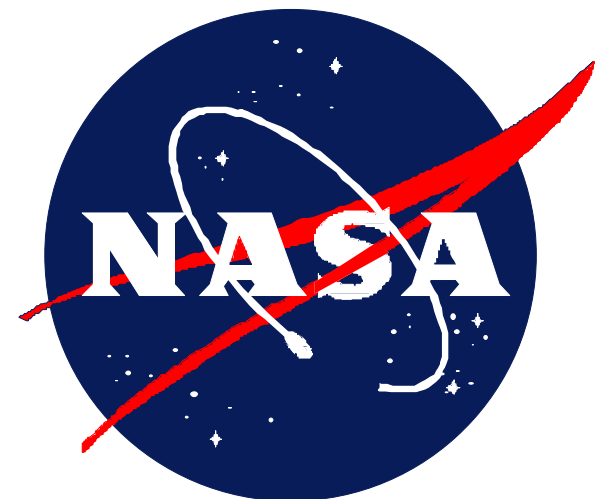
Reviewing the WYE Allocation

WYE (Annual) – Output Area

FTE and \$ (Annual)		Travel \$ (Annual)		SP Units and \$ (Annual)		Other Dir \$ (Annual)		WYE (Annual)		FTE and \$ (Phase)		Travel \$ (Phase)	
	Source	Detail	Guide Type	OG Type	NASA Org		Contract	Vendor Name	Location	FY 2004 WYEs	FY 2005 WYEs	FY 2006 WYEs	FY 2007 WYEs
	CTR	#	INGUIDE	#	21AS	Space Technol...	#	#	ONSITE	1.1	0.0	0.0	
	CTR	#	INGUIDE	#	21SF	Space Projects...	#	#	ONSITE	1.1	0.0	0.0	
	CTR	#	INGUIDE	OG Type	NASA Org	Total	Contract		Location	2.2	0.0	0.0	
	CTR	Detail	Guide Type	OG Type	NASA Org	Total	Contract		Location	2.2	0.0	0.0	
	DIRECT	#	INGUIDE	#	21AS	Space Technol...	UONTRACT1	Unassigned	ONSITE	7.0	7.0	7.0	
	DIRECT	#	INGUIDE	#	21SF	Space Projects...	UONTRACT2	Unassigned	ONSITE	12.0	12.0	12.0	
	DIRECT	#	INGUIDE	OG Type	NASA Org	Total	Contract		Location	19.0	19.0	19.0	
	DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	Contract		Location	19.0	19.0	19.0	
	Source	Detail	Guide Type	OG Type	NASA Org	Total	Contract		Location	21.2	19.0	19.0	

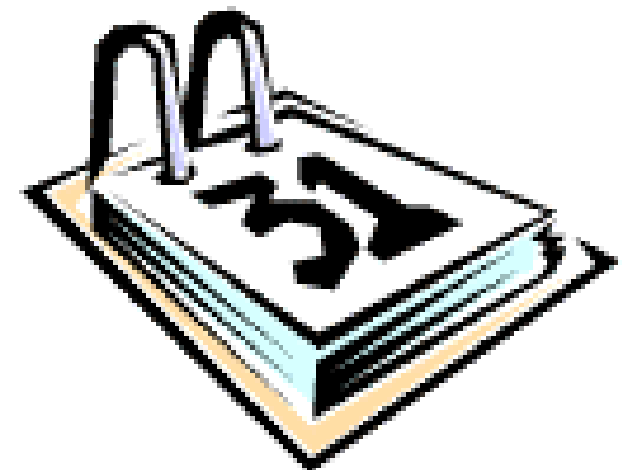
1. Click on the **WYE (Annual) button** in the output area
2. Look for the **Source Column**
3. Review the allocations from different sources

Phasing



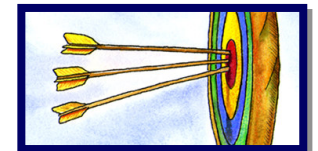
- During initial and mid-year phasing plan creation, phasing occurs for projects, service pools, Center G&A and Corporate G&A using manual entry or algorithms built into the system.

- Phasing Topics:
 - How to phase
 - Phasing algorithms
 - Incremental and cumulative phasing



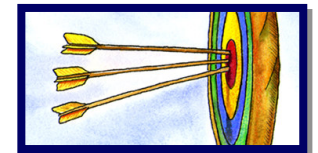
Phasing Goal

- **Goal:** Use the phasing input areas to phase Project Planning requests for FTEs, FTE \$, Travel \$, Service Pool \$ and WYEs
- **Why:** Phasing plans are done for the year of execution as a means of tracking performance. Phasing plans usually follow plans for spending on technical milestones. These plans will be used in conjunction with Core Financial data for plans vs. actuals analysis.



■ Phasing

1. Logon
2. Open the “Project Planning (FTE, Travel, SP, Other Dir \$, WYE)” folder
3. Enter Header Data (ensure budget year and fiscal year are correct)
4. Click on the appropriate Phasing Input Layout Button
5. Use algorithm buttons or manually enter phasing data
6. View the data in the matching output area
7. Save the data when complete



Header Data for Phasing

Header Area				
	Name of Variable	Long description	Selection	Characteristic Value Ext. Display
	Center	BA	21	Ames Research Center
	Budget Year	Budget Year	2006	2006
	Agency Version	Agency Version	A001	Pre-POP
	Center Version	Center Version	C001	C001
	Type of Planning	Type of Planning	NOA	New Obligation Auth.
	Appropriation Type	Appropriation Type	SAT	Science and Tech
	WBS Element	WBS element	21-721-10-	Systems Engineering/architecture
	Network	Network	#	Not assigned
	Activity	Network activity	#	Not assigned
	Fiscal Year	Fiscal year	2004	2004

Center	The two-digit Center number
Budget Year	The year you are planning
Agency Version	The Agency Version you are working in (A001-A006)
Center Version	The Center Version you are working in (C001-C005)
Type of Planning	The type of Budget Plan (NOA or COST)
Appropriation Type	The appropriation the Project belongs to (SAT or HSF)
WBS Element	The WBS Element you are planning for
Network	The Network you are planning for (# - unassigned)
Network Activity	The Network activity you are planning for (# - unassigned)
Fiscal Year	The fiscal year you are working in (Budget Year -2)

- The year of information you are phasing is dictated by the year you have showing under **Fiscal Year**



Input Area

WYE (Phase) Input Area

WYE (Phase) – Input Area

Name of Variable

Long description

Selection

Characteristic Value

Ext. Display

Selection

CharVal...

Center

BA

21

Ames Research Center

Budget Year

Budget Year

2006

2006

Agency Version

Agency Version

A001

Pre-POP

Center Version

Center Version

C001

C001

Type of Planning

Type of Planning

NOA

New Obligation Auth.

Appropriation Type

Appropriation Type

SAT

Science and Tech

WBS Element

WBS element

21-721-10-

Systems Engineering/architecture

Version Control: Copy

Version Control: Draft Submit

Version Control: Final Submit

Version Control: Restore

Check ALL Bus. Rules

SEM TEAM USE ONLY

ase)

Travel \$ (Phase) - Incremental

Travel \$ (Phase) - Cumulative

SP Units (Phase)

SP Units (Phase) - Delta

WYE (Phase)

User-Defined % (Phase)

Recompute

Straight-Line

Ramp-Up

Ramp-Down

User-Defined

Check Bus. Rules

Guide Type

OG Ty...

NASA Org

Contract

Vendor Name

Location

OCT - WYEs

NOV - WYEs

DEC - WYEs

JAN - WYEs

FEB - WYEs

MAR - WYEs

INGUIDE

#

21AS

Space Tech...

UCONTRACT1

Unassigned

ONSITE

7.0

7.0

7.0

7.0

7.0

7.0

INGUIDE

#

21SF

Space Proje...

UCONTRACT2

Unassigned

ONSITE

12.0

12.0

12.0

12.0

12.0

12.0

nd \$ (Annual)

Other Dir \$ (Annual)

WYE (Annual)

FTE and \$ (Phase)

Travel \$ (Phase)

SP Units and \$ (Phase)

Other Dir \$ (Phase)

WYE (Phase)

Source

Detail

Guide Type

OG Type

NASA Org

Contract

Vendor Name

Location

OCT - WYEs

NOV - WYEs

DEC - WYEs

JAN - WYEs

FEB - WYEs

MAR -

DIRECT

#

INGUIDE

#

21AS

Space Te...

UCONTRACT1

Unassigned

ONSITE

7.0

7.0

7.0

7.0

7.0

DIRECT

#

INGUIDE

#

21SF

Space Pr...

UCONTRACT2

Unassigned

ONSITE

12.0

12.0

12.0

12.0

12.0

DIRECT

#

INGUIDE

OG Type

NASA Org

Total

Contract

Location

19.0

19.0

19.0

19.0

19.0

DIRECT

Detail

Guide Type

OG Type

NASA Org

Total

Contract

Location

19.0

19.0

19.0

19.0

19.0

Input Area

BF Release 0.5 Training – Revision 1

Slide #136



Travel \$ (Phase) Input Area

Travel \$ (Phase) – Input Area

Name of Variable	Long description	Selection	Characteristic Value	Ext. Display	Selection	CharVal...
Center	BA	21	Ames Research Center			
Budget Year	Budget Year	2006	2006			
Agency Version	Agency Version	A001	Pre-POP			
Center Version	Center Version	C001	C001			
Type of Planning	Type of Planning	NOA	New Obligation Auth.			
Appropriation Type	Appropriation Type	SAT	Science and Tech			
WBS Element	WBS element	21-721-10-	Systems Engineering/architecture			

Version Control: Copy Version Control: Draft Submit Version Control: Final Submit Version Control: Restore Check ALL Bus. Rules SEM TEAM USE ONLY

Annual Other Dir \$ (Annual) WYE (Annual) FTE (Phase) FTE \$ (Phase) - Incremental FTE \$ (Phase) - Cumulative Travel \$ (Phase) Travel \$ (Phase)

Recompute Straight-Line Ramp-Up Ramp-Down User-Defined Check Bus. Rules

Guide Type	OG Type	NASA Org		OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total
INGUIDE	#	21AS	Space Technology Division	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	
INGUIDE	#	21SF	Space Projects Division	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	
INGUIDE	OG Type	NASA Org	Total	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	

FTE and \$ (Annual) Travel \$ (Annual) SP Units and \$ (Annual) Other Dir \$ (Annual) WYE (Annual) FTE and \$ (Phase) Travel \$ (Phase) SP Units a

Source	Detail	Guide Type	OG Type	NASA Org		OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$
DIRECT	#	INGUIDE	#	21AS	Space Technology Division	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6.250	6
DIRECT	#	INGUIDE	#	21SF	Space Projects Division	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1.667	1
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7.917	7

Input Area



SP Units (Phase – DSP only) Input Area

SP Units (Phase – DSP only) – Input Area

Name of Variable
Long description
Selection
Characteristic Value Ext. Display
Selection
CharVal...

Center	BA	21	Ames Research Center		
Budget Year	Budget Year	2006	2006		
Agency Version	Agency Version	A001	Pre-POP		
Center Version	Center Version	C001	C001		
Type of Planning	Type of Planning	NOA	New Obligation Auth.		
Appropriation Type	Appropriation Type	SAT	Science and Tech		
WBS Element	WBS element	21-721-10-	Systems Engineering/architecture		

Version Control: Copy
Version Control: Draft Submit
Version Control: Final Submit
Version Control: Restore
Check ALL Bus. Rules
SEM TEAM USE ONLY

ase)
Travel \$ (Phase) - Incremental
Travel \$ (Phase) - Cumulative
SP Units (Phase)
SP Units (Phase) - Delta
WYE (Phase)
User-Defined % (Phase)

Recompute
Execute Allocation
Straight-Line
Ramp-Up
Ramp-Down
User-Defined
Prime (Req=Est)
Refresh SP Rate
Check



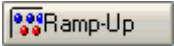



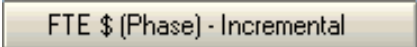
Guide Type
OG Type
BA
NASA Org
Service pool
Sub-pool
UOM
SP Type
OCT - Units
NOV - Units
DEC - Units
JAN - Units
FEB - Units
MAR - Units

INGUIDE	#	21	21AS	Space Technology Division	S&E	ENG	HR	DSP	5.0	5.0	5.0	5.0	5.0	5.0
---------	---	----	------	---------------------------	-----	-----	----	-----	-----	-----	-----	-----	-----	-----

and \$ (Annual)
Other Dir \$ (Annual)
WYE (Annual)
FTE and \$ (Phase)
Travel \$ (Phase)
SP Units and \$ (Phase)
Other Dir \$ (Phase)
WYE (Phase)

Source	Detail	Guide Type	OG Type	BA	NASA Org	Service pool	Sub-pool	UOM	SP Type	OCT - Units	OCT - \$	NOV - Units	NOV - \$	DEC - Units	D
DIRECT	#	INGUIDE	#	21	21AS	Space Technology Division	S&E	ENG	HR	DSP	5.0	0.000	5.0	0.000	5.0
DIRECT	#	INGUIDE	OG Type	BA	NASA Org	Total	Service pool	Sub-pool		5.0	0.000	5.0	0.000	5.0	
DIRECT	Detail	Guide Type	OG Type	BA	NASA Org	Total	Service pool	Sub-pool		5.0	0.000	5.0	0.000	5.0	
Source	Detail	Guide Type	OG Type	BA	NASA Org	Total	Service pool	Sub-pool		5.0	0.000	5.0	0.000	5.0	

Input Area

- **Straight-Line:** 
 - Uses the same percentage in each month (Total / 12)
- **User-Defined:** 
 - Allows you to define a series of percentages to apply to the amounts for each month
- **Ramp Up:**  (Only Available for WYEs, Travel, & SP)
 - Amount *increases* each month & average equals the annual planned
- **Ramp Down:**  (Only Available for WYEs, Travel, & SP)
 - Amount *decreases* each month & average equals the annual planned
- **Manual:** 
 - Manually enter the numbers Cost Center by Cost Center.
- **Cumulative Phasing** 
 - Carries in prior year money available monthly
- **Incremental Phasing** 
 - Shows the entire amount of money carried in from prior years that has been phased up to the current month
- Each button, if used, applies the same algorithm to all of the Cost Center that were planned during the annual planning.



Straight-Line Phasing of FTEs

Straight-Line FTE (Phase) – Input Area

Annual
Other Dir \$ (Annual)
WYE (Annual)
FTE (Phase)
FTE \$ (Phase) - Incremental
FTE \$ (Phase) - Cumulative
Travel \$ (Phase)
Travel \$ (Phase) ▶

Recompute
Straight-Line
User-Defined
Refresh FTE Rate
Check Bus. Rules

Guide Type
OG Type
NASA Org

LC
OCT - FTEs
NOV - FTEs
DEC - FTEs
JAN - FTEs
FEB - FTEs
MAR - FTEs
APR - FTEs
MAY - FTEs
JUN - FTEs
JUL - FTEs



INGUIDE	#	21AS	Space Techno...	#	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
INGUIDE	OG Type	NASA Org	Total	LC	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0
Guide Type	OG Type	NASA Org	Total	LC	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0	5.0

- 1) In the Header Area, ensure the fiscal year is set to the year you want to phase the annual numbers for
- 2) Select the appropriate **FTE (Phase) input** layout
- 3) Click the **Straight-Line button**. All of the FTEs you have planned will appear in each month for the fiscal year
- 4) Make any manual adjustments to the numbers
- 5) Click the **Transfer Variables button** to sort the data you entered
- 6) Click the **Recompute button** to total your rows and move the data to the output area
- 6) View the resulting output in the **FTE and \$ (Phase) output** area
- 7) Click the **Save button** when complete

User-Defined Phasing of FTEs

User-Defined % (Phase) – Input Area																	
Travel \$ (Phase) - Incremental	Travel \$ (Phase) - Cumulative	SP Units (Phase)	SP Units (Phase) - Delta	WYE (Phase)	User-Defined % (Phase)												
						OCT - %	NOV - %	DEC - %	JAN - %	FEB - %	MAR - %	APR - %	MAY - %	JUN - %	JUL - %	AUG - %	SEP - %
Phasing: FTE						5	5	10	10	10	10	10	10	10	10	5	5
Phasing: Travel						5	5	10	10	10	10	10	10	10	10	5	5
Phasing: Svc Pools						0	0	0	10	20	20	10	10	10	10	5	5
Phasing: WYE						5	5	10	10	10	10	10	10	10	10	5	5

- 1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase
- 2) In the input area, scroll to the right until you see the **User-Defined % (Phase) button**
- 3) Enter the percentages you want to phase. (Total must add to 100% for commits and obs. Cost must add up to 83%)

Note: Unlike most of the other input areas, the User-Defined % (Phase) input area does not require you to click either the Transfer Variables button  or the Recompute button.  Do not worry, your data will be saved.



User-Defined Phasing of FTEs

User Defined FTE (Phase) – Input and Output Areas

Annual) Other Dir \$ (Annual) WYE (Annual) **FTE (Phase)** FTE \$ (Phase) - Incremental FTE \$ (Phase) - Cumulative Travel \$ (Phase) Travel \$ (Phase) ▶

Recompute Straight-Line **User-Defined** Refresh FTE Rate Check Bus. Rules

Guide Type	OG Type	NASA Org		LC	OCT - FTEs	NOV - FTEs	DEC - FTEs	JAN - FTEs	FEB - FTEs	MAR - FTEs	APR - FTEs	MAY - FTEs	JUN - FTEs
INGUIDE	#	21AS	Space Technology Division	#	0.3	0.3	0.5	0.5	0.5	0.5	0.5	0.5	
INGUIDE	OG Type	NASA Org	Total	LC	0.3	0.3	0.5	0.5	0.5	0.5	0.5	0.5	
Guide Type	OG Type	NASA Org	Total	LC	0.3	0.3	0.5	0.5	0.5	0.5	0.5	0.5	

◀ ▶

nd \$ (Annual) Other Dir \$ (Annual) WYE (Annual) **FTE and \$ (Phase)** Travel \$ (Phase) SP Units and \$ (Phase) Other Dir \$ (Phase) WYE (Phase)

Source	Detail	Guide Type	OG Type	NASA Org		LC	OCT - FTEs	OCT - \$	NOV - FTEs	NOV - \$	DEC - FTEs	DEC - \$	JAN - FTEs	JAN - \$	FEB - FTEs
DIRECT	#	INGUIDE	#	21AS	Space Technology Division	#	0.3	0.000	0.3	0.000	0.5	0.000	0.5	0.000	0.5
DIRECT	#	INGUIDE	OG Type	NASA Org	Total	LC	0.3	0.000	0.3	0.000	0.5	0.000	0.5	0.000	0.5
DIRECT	Detail	Guide Type	OG Type	NASA Org	Total	LC	0.3	0.000	0.3	0.000	0.5	0.000	0.5	0.000	0.5
Source	Detail	Guide Type	OG Type	NASA Org	Total	LC	0.3	0.000	0.3	0.000	0.5	0.000	0.5	0.000	0.5

- 4) In the input area, click the **FTE (Phase) button**
- 5) In the lower row of input area buttons, click the **User Defined button** to apply the percentages to the annual numbers
- 6) View the resulting FTE output in the **FTE and \$ (Phase) output** area
- 7) Click the **Save button** when complete



Manual Phasing of FTEs

Manual FTE (Phase) – Input Area

Annual
Other Dir \$ (Annual)
WYE (Annual)
FTE (Phase)
FTE \$ (Phase) - Incremental
FTE \$ (Phase) - Cumulative
Travel \$ (Phase)
Travel \$ (Phase)

Recompute
Straight-Line
User-Defined
Refresh FTE Rate
Check Bus. Rules

Guide Type
OG Type
NASA Org

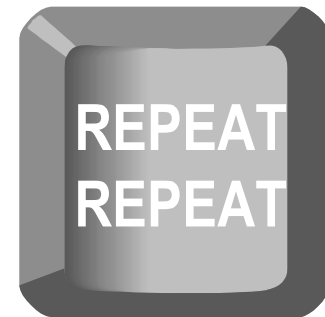
LC
OCT - FTEs
NOV - FTEs
DEC - FTEs
JAN - FTEs
FEB - FTEs
MAR - FTEs
APR - FTEs
MAY - FTEs
JUN - FTEs
JUL - FTEs

INGUIDE	#	21AS	Space Tec...	#	0.1	0.5	1.0	1.3	1.0	1.0	0.3	0.2	0.1
INGUIDE	OG Type	NASA Org	Total	LC	0.1	0.5	1.0	1.3	1.0	1.0	0.3	0.2	0.1
Guide Type	OG Type	NASA Org	Total	LC	0.1	0.5	1.0	1.3	1.0	1.0	0.3	0.2	0.1

- 1) In the Header Area, ensure the fiscal year is set to the fiscal year you want to phase
- 2) In the input area, click on the **FTE (Phase) button**
- 3) Click on the **Append Row button** to add a row
- 4) Enter the guide type, overguide type, NASA organization, labor category, and the monthly numbers for the organization
- 5) Click the **Transfer Variables button** to sort the new row
- 6) Repeat for each organization
- 7) Click the **Save button** when complete

Phasing FTE\$, Travel, SP, and WYEs

- The Phasing Algorithm buttons work the same way for each of the other areas not demonstrated
 - FTE \$
 - Travel
 - Service Pools
 - WYEs
- Each has an output area where you can see the associated dollars by month.





FTE Incremental and Cumulative Phasing

Project Planning Input Area					
Other Dir \$ (Annual)	WYE (Annual)	FTE (Phase)	FTE \$ (Phase) - Incremental	FTE \$ (Phase) - Cumulative	Travel \$ (▶)

SPECIAL NOTE: The system allows Project Planning requesters the option to view and phase the FTE \$ amounts by an Incremental view or a Cumulative view. This added feature allows for different methods of viewing the phasing data

FTE \$ (Phase) Incremental: This view allows the Project Planning requester to phase prior and previous years obligation and cost amounts in an incremental view. The current year obligation and cost amounts are driven by the phasing of the FTE units and the phased FTE rates

FTE \$ (Phase) Cumulative: This view allows the Project Planning requester to phase prior and previous years obligation and cost amounts in a cumulative view. The current year obligation and cost amounts are driven by the phasing of the FTE units and the phased FTE rates



- The difference between Incremental vs. Cumulative Phasing layouts:
 - Incremental layout depicts the monthly phased \$ for a single month in the month columns.
 - Cumulative layout depicts the year-to-date phased \$ in the month columns.

Incremental

	Carry In	OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total 2058 \$
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	60.000	75.000	60.000	75.000	60.000	75.000	60.000	75.000	60.000	75.000	60.000	75.000	810.000

The same data presented differently

Cumulative

	Carry In	OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total 2058 \$
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	60.000	135.000	195.000	270.000	330.000	405.000	465.000	540.000	600.000	675.000	735.000	810.000	810.000



Phase \$ - Incremental

FTE \$ (Phase) - Incremental

^YE (Annual)

FTE (Phase)

FTE \$ (Phase) - Incremental

FTE \$ (Phase) - Cumulative

Travel \$ (Phase)

Travel \$ (Phase) - Incremental

T

Recompute

</

- 1) In the Header Area, ensure the fiscal year is set to the year of annual numbers you want to phase
- 2) In the input area, click the **FTE \$ (Phase) – Incremental** button
- 3) Enter Carry In values for:

OBS – Prior PY	Prior Program Year money available to obligate
COSTS – Prior PY	Obligated Prior Program Year money available to cost
COSTS – Prev PY	The sum of all Obligated money available to cost (predating the Prior PY)
COSTS – TOTAL	Total of all your Program Year costs



Phase \$ - Cumulative

FTE \$ (Phase) - Cumulative

^YE (Annual)	FTE (Phase)	FTE \$(Phase) - Incremental	FTE \$(Phase) - Cumulative	Travel \$(Phase)	Travel \$(Phase) - Incremental	Travel \$(Phase)									
Recompute															
<div><div></div><div></div><div></div><div></div><div></div><div></div><div></div></div>															
	Carry In	OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total 2003 \$	Carry Out
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	125.000	208.333	291.667	375.000	531.250	687.500	843.750	1,000.000	1,156.250	1,312.500	1,468.750	1,885.417	1,885.417	0.000
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Prior PY	125.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	125.000
COSTS - Curr PY	0.000	125.000	208.333	291.667	375.000	531.250	687.500	843.750	1,000.000	1,156.250	1,312.500	1,468.750	1,885.417	1,885.417	0.000
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

- 1) In the Header Area, ensure the fiscal year is set to the year of annual numbers you want to phase
- 2) Select the **FTE \$ (Phase) – Cumulative** input layout
- 3) Enter Carry In values for:

OBS – Prior PY	Prior Program Year money available to obligate
COSTS – Prior PY	Obligated Prior Program Year money available to cost.
COSTS – Prev PY	The sum of all Obligated money available to cost
(predating	the Prior PY).
COSTS – TOTAL	Total of all your Program Year costs



Planning Folder for Other Direct \$ Phasing

Planning Folders

- Center Control Planning (FTEs / R&PM)
- Center Control Planning (Travel \$)
- Primary Resource Dist. (FTEs)
- Primary Resource Dist. (Travel \$)
- Projects - Secondary FTE Dist.
- Projects - Secondary Travel \$ Dist.
- Service Pools - Secondary FTE Dist.
- Service Pools - Secondary Travel \$ Dist.
- Ctr G&A - Secondary FTE Dist.
- Ctr G&A - Secondary Travel \$ Dist.
- Corp G&A - Secondary FTE Dist.
- Corp G&A - Secondary Travel \$ Dist.
- Proj Plan (FTE,Travel,SP,Oth Dir \$,WYE)
- PP-Phasing (Other Dir \$)**
- Svc Pool (FTE,Travel,SP,Oth Dir \$,WYE)



In addition to the project planning folder, the Project Planning Requester also has access to the PP- Phasing (Other Direct \$) folder.

Note: Phasing for Project Planning Other Direct \$ requests is performed in a separate planning folder because the header data contains more fields than the phasing plans for FTEs, Travel \$, SP Units, and WYEs. The separate folder allows you to phase each line individually. Phasing for Other Direct \$ occurs in the Project Plan – Phasing (Other Dir \$) planning folder





Header Data for Other Direct \$ Phasing

Project Planning Phasing– Header Area (Other Direct \$)				
	Name of Variable	Long description	Selection	Characteristic Value Ext. Display
	Center	BA	21	Ames Research Center
	Budget Year	Budget Year	2006	2006
	Agency Version	Agency Version	A001	Pre-POP
	Center Version	Center Version	C001	C001
	Type of Planning	Type of Planning	NOA	New Obligation Auth.
	Appropriation Type	Appropriation Type	SAT	Science and Tech
	WBS Element	WBS element	21-721-10-	Systems Engineering/architecture
	Network	Network	#	Not assigned
	Activity	Network activity	#	Not assigned
	Fiscal Year	Fiscal year	2004	2004
	Guide Type	Guide Type	INGUIDE	In Guide
	Overguide Type	OG Type	#	Not assigned
	Organization	NASA Org	21AS	Space Technology Division
	Fund Source	FS	#	Not assigned
	Contract	Contract	#	Not assigned
	Commitment Item	CI	#	#

- **Center** The two-digit Center number (your Center).
- **Budget Year** The Budget year you are planning
- **Agency Version** The Agency Version you are working in
- **Center Version** The Center Version you are working in (C001-C005)
- **Type of Planning** The type of Planning (NOA or Cost)
- **Appropriation Type** The Appropriation the Project belongs to (SAT or HSF)
- **WBS Element** The WBS element you are phasing for
- **Network** The Network you are phasing for if applicable (# - unassigned)



Header Data for Other Direct \$ Phasing

Project Planning Phasing– Header Area (Other Direct \$)				
	Name of Variable	Long description	Selection	Characteristic Value Ext. Display
	Center	BA	21	Ames Research Center
	Budget Year	Budget Year	2006	2006
	Agency Version	Agency Version	A001	Pre-POP
	Center Version	Center Version	C001	C001
	Type of Planning	Type of Planning	NOA	New Obligation Auth.
	Appropriation Type	Appropriation Type	SAT	Science and Tech
	WBS Element	WBS element	21-721-10-	Systems Engineering/architecture
	Network	Network	#	Not assigned
	Activity	Network activity	#	Not assigned
	Fiscal Year	Fiscal year	2004	2004
	Guide Type	Guide Type	INGUIDE	In Guide
	Overguide Type	OG Type	#	Not assigned
	Organization	NASA Org	21AS	Space Technology Division
	Fund Source	FS	#	Not assigned
	Contract	Contract	#	Not assigned
	Commitment Item	CI	#	#

(continuation)

- **Activity** The Activity you are phasing for if applicable (# - unassigned)
- **Fiscal Year** The fiscal year you are phasing
- **Guide Type** Inguide or Overguide
- **Overguide Type** Overguide type:New Initiative, Augment, Price, (# unassigned)
- **Organization** The Organization responsible for the Other Direct \$
- **Fund Source** Fund Source
- **Contract** The contract ID or UCONTRACT(n) for unassigned
- **Commitment Item** Commitment Item

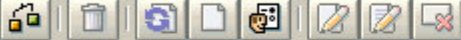


Incremental Phasing – Other Direct \$

Incremental Phasing of Other Direct \$ - Input Area

IncrementalCumulative

RecomputePhasing: Straight-LineCheck Bus. Rules



	Carry In	OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total 2003 \$	Carry Out
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	0.000
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Curr PY	0.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	0.000
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

- 1) In the Header Area, ensure the fiscal year is set to the year of annual numbers you want to phase
- 2) Click the **Incremental** button
- 3) Enter Carry In values for:

OBS – Prior PY	Prior Program Year money available to obligate
OBS – Curr PY	Current Program Year money available to obligate
COSTS – Prev PY	The sum of all Obligated money available to cost (predating the Prior PY)

(continued)



Incremental Phasing – Other Direct \$

Incremental Phasing of Other Direct \$ - Input Area

Incremental

Cumulative

Recompute

Phasing: Straight-Line

Check Bus. Rules

		Carry In	OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total 2003 \$	Carry Out
	OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
	OBS - Curr PY	0.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	0.000
	COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
	COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
	COSTS - Curr PY	0.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	25.000	300.000	0.000
	COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000

3) Enter Carry In values for (continued):

COSTS – Prior PY Obligated Prior Program Year money available to cost

COSTS – Curr PY Current year obligated money to be costed

COSTS – TOTAL Total of all your Program Year costs

Cumulative Phasing – Other Direct \$

Cumulative Phasing of Other Direct \$ - Input Area

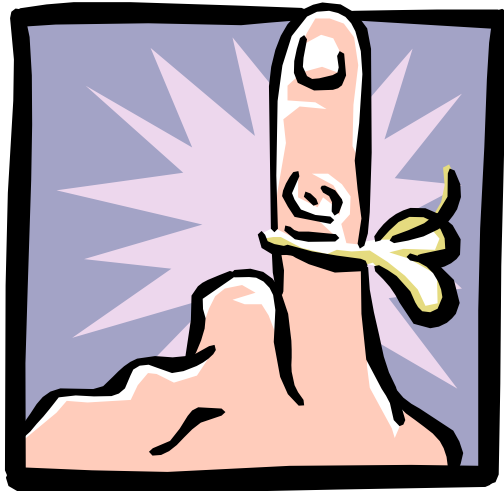
Incremental

Cumulative

Recompute

Check Bus. Rules

	Carry In	OCT - \$	NOV - \$	DEC - \$	JAN - \$	FEB - \$	MAR - \$	APR - \$	MAY - \$	JUN - \$	JUL - \$	AUG - \$	SEP - \$	Total 2003 \$	Carry Out
OBS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
OBS - Curr PY	0.000	25.000	50.000	75.000	100.000	125.000	150.000	175.000	200.000	225.000	250.000	275.000	300.000	300.000	0.000
COSTS - Prev PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Prior PY	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000
COSTS - Curr PY	0.000	25.000	50.000	75.000	100.000	125.000	150.000	175.000	200.000	225.000	250.000	275.000	300.000	300.000	0.000
COSTS - TOTAL	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000	0.000



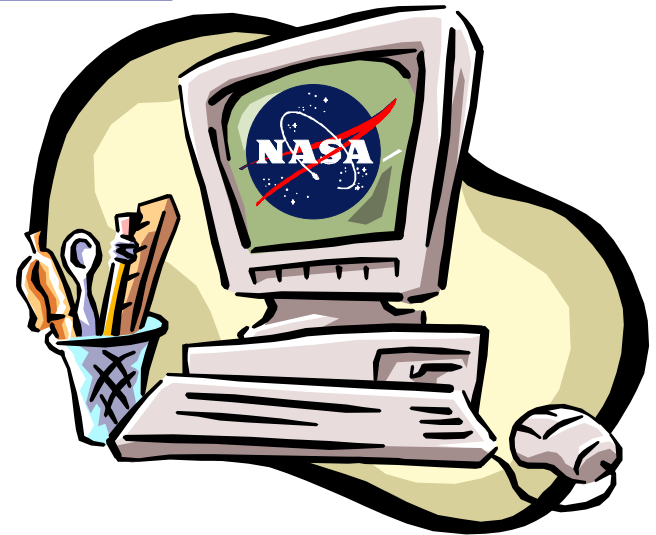
Reminder: Cumulative phased data is the same as Incremental phased data only presented differently. The process for Cumulative phasing is also the same, therefore, we will not review Cumulative phasing during this course.

Demonstrations and Exercises

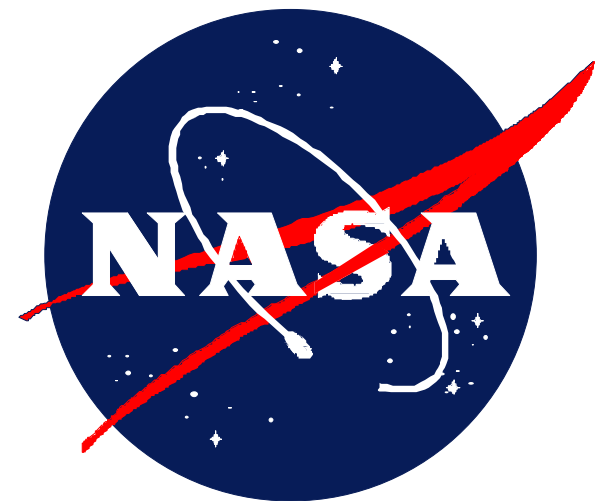
- Now, let's get our hands on the system.



Using your exercise handout, go to
***Project Planning & Corporate G&A
Phasing Exercise: (steps 1-30)***



End of Course Review



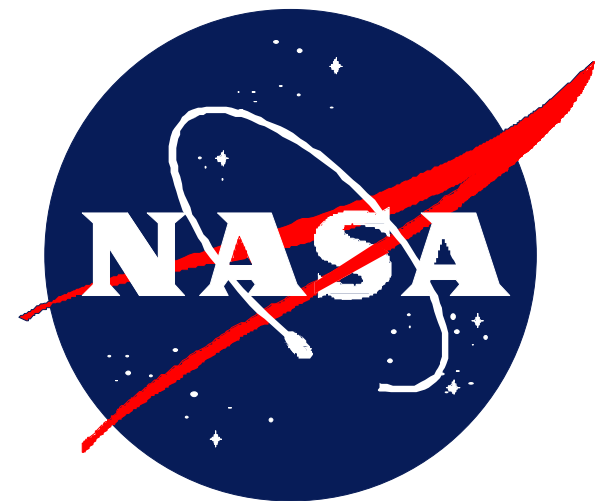
Review Objectives & Expectations

■ Project Planners should now be able to:



- ✓ Distribute Project FTEs and Travel \$ from Secondary Distribution to lowest planning levels
- ✓ Request Project WBS element FTEs, FTE \$, Travel \$, Service Pools, WYE and Other Direct \$
- ✓ Phase all Project Planning
- ✓ Review G&A Allocations and other Full Cost attributes
- ✓ Access and manipulate the Project Planning BW reports
- ✓ Explain Versioning and Business Rules
- ✓ Explain the system overview and its points of integration
- ✓ Explain the business context for using the system
- ✓ Explain the roles in this class

Congratulations!



Training Course Feedback

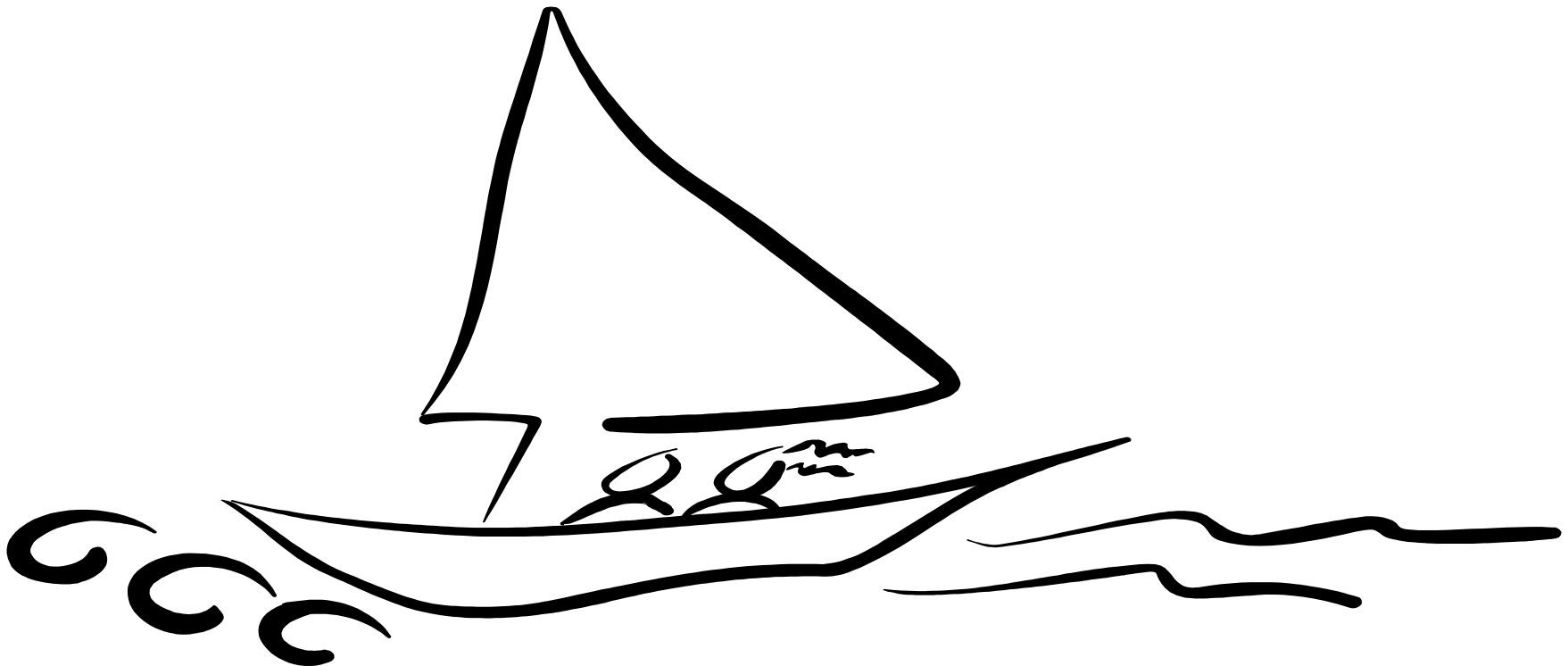
- The training course feedback will:
 - Assess the effectiveness of the instruction and training materials for the course



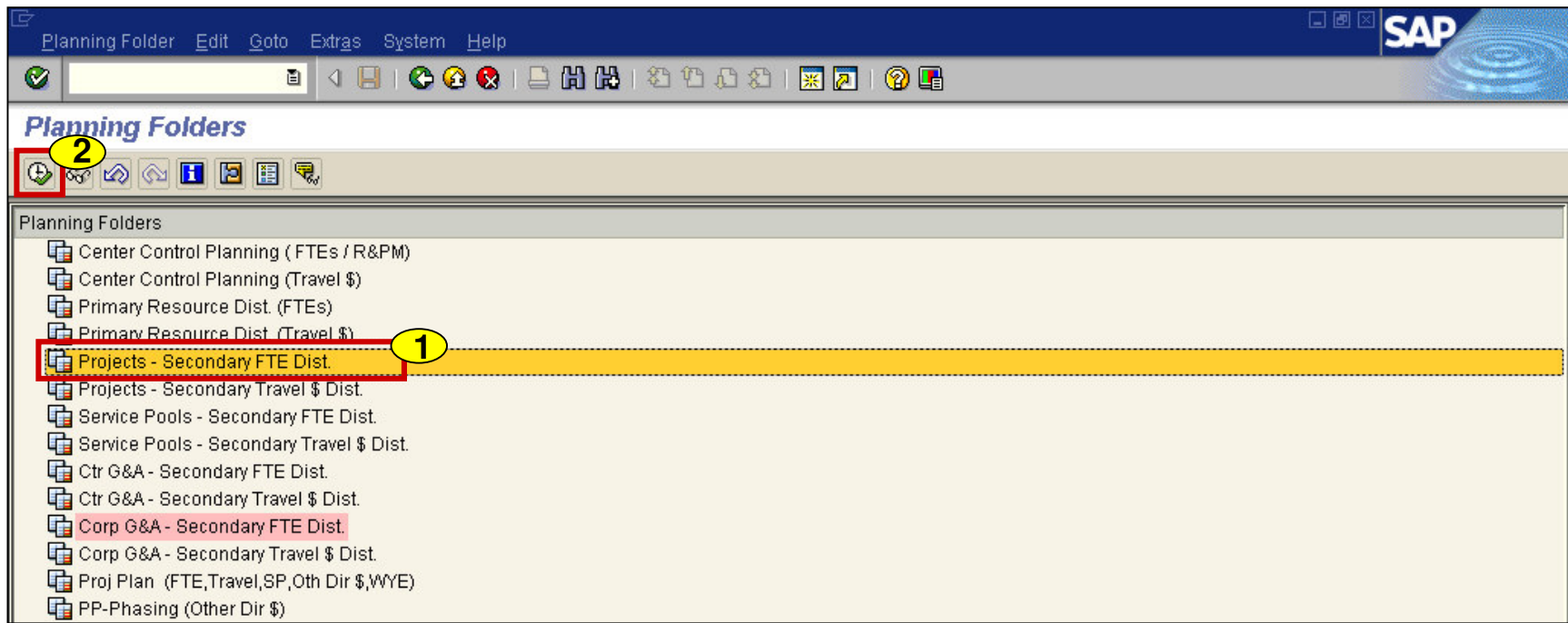


Supplemental Material

BF Navigation Overview



How Do I Access a Planning Folder?

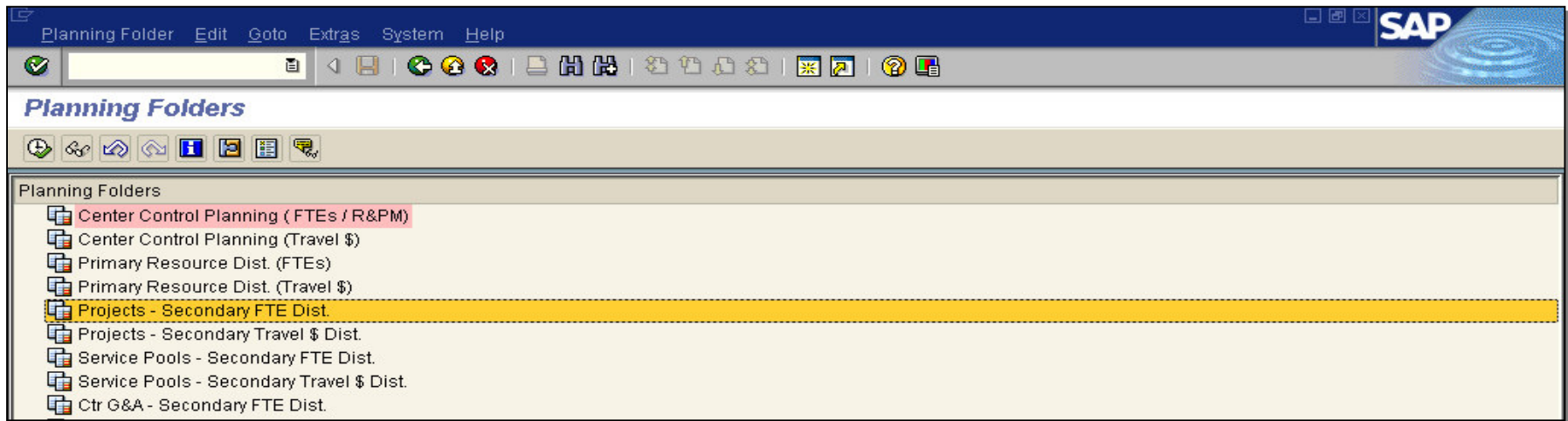


- ① From the Planning Folder Menu page, select the folder you would like to enter (the folder will become highlighted in yellow.)
- ② Click the **Execute** button.



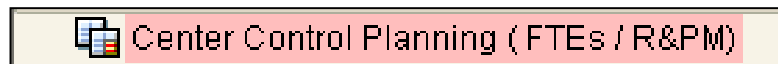
NOTE: Users can also double-click on the desired Planning Folder to enter.

What Do the Planning Folder Colors Mean?



■ From the Planning Folder Menu page:

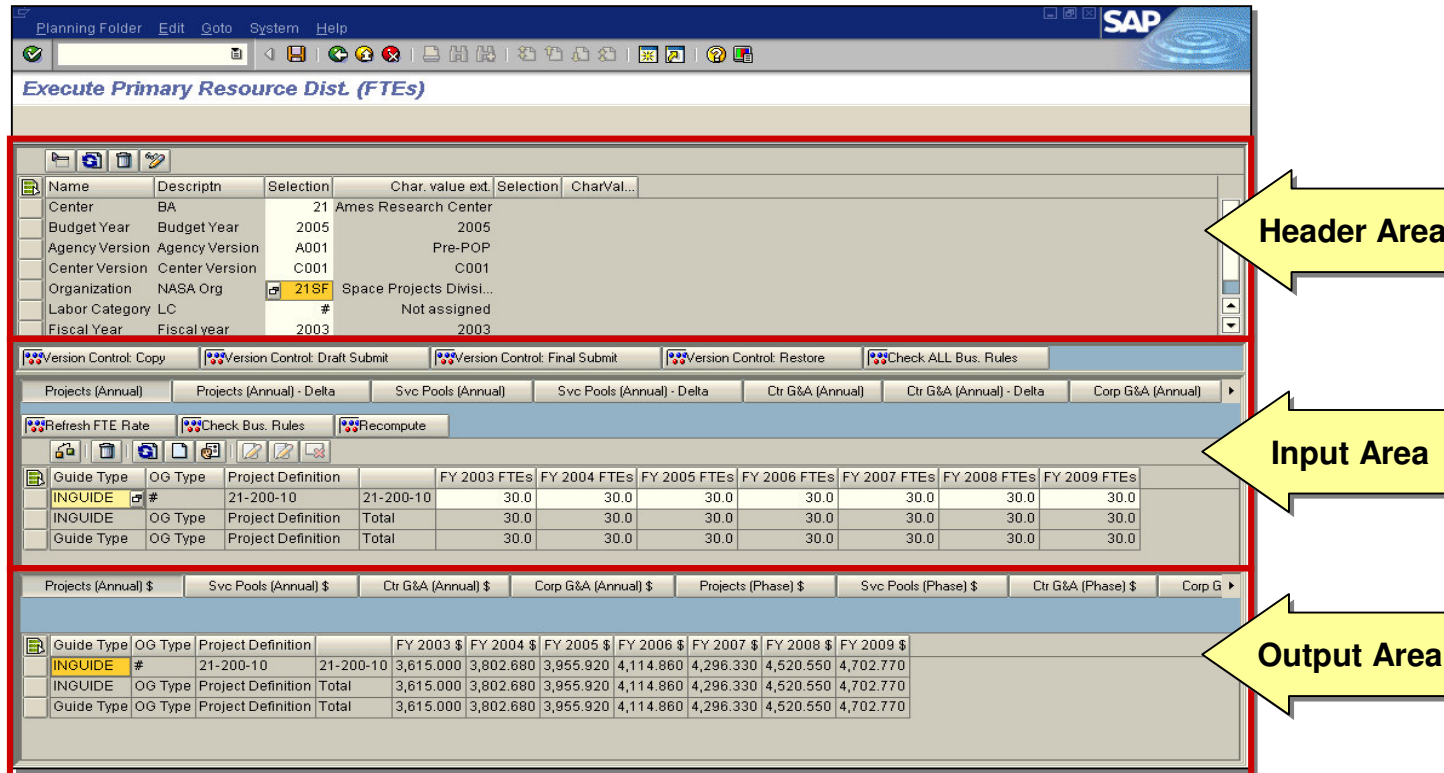
- A planning folder highlighted in **PINK** indicates the previous folder a user entered.



- A planning folder highlighted in **YELLOW** indicates the folder the user has selected.



What Are the Primary Sections of a Typical Screen?



The screenshot shows the SAP 'Execute Primary Resource Dist. (FTEs)' screen. It is divided into three main sections as indicated by yellow arrows:

- Header Area:** Contains fields for Name, Descriptn, Selection, Char. value ext, Selection, and CharVal. The data shown includes: Center BA, 21 Ames Research Center, Budget Year 2005, Agency Version A001, Center Version C001, Organization NASA Org, Labor Category LC, and Fiscal Year 2003.
- Input Area:** Contains buttons for Version Control (Copy, Draft Submit, Final Submit, Restore) and Check ALL Bus. Rules. Below these are tabs for Projects (Annual), Svc Pools (Annual), Ctr G&A (Annual), and Corp G&A (Annual). There are also buttons for Refresh FTE Rate, Check Bus. Rules, and Recompute.
- Output Area:** Contains two tables. The first table shows FTEs for FY 2003 through FY 2009. The second table shows dollar amounts for the same years.

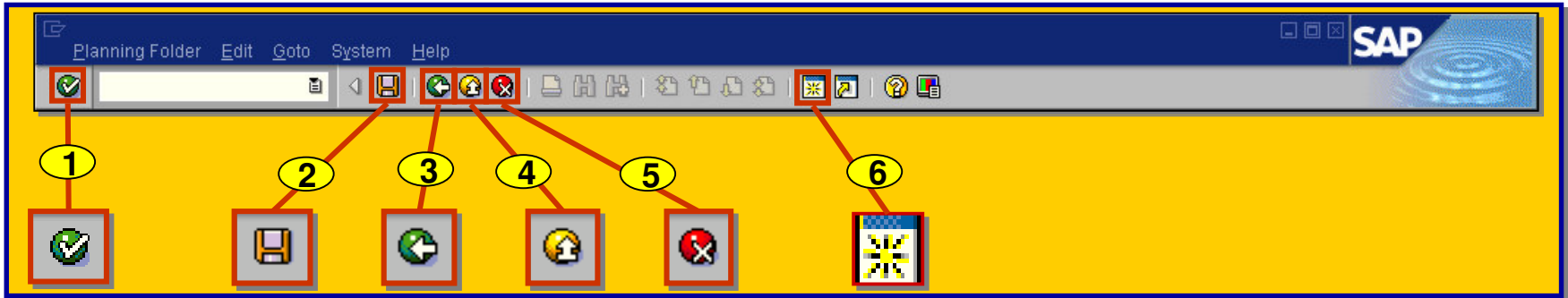
Guide Type	OG Type	Project Definition		FY 2003 FTEs	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs	FY 2008 FTEs	FY 2009 FTEs
INGUIDE	#	21-200-10	21-200-10	30.0	30.0	30.0	30.0	30.0	30.0	30.0
INGUIDE	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	30.0
Guide Type	OG Type	Project Definition	Total	30.0	30.0	30.0	30.0	30.0	30.0	30.0

Guide Type	OG Type	Project Definition		FY 2003 \$	FY 2004 \$	FY 2005 \$	FY 2006 \$	FY 2007 \$	FY 2008 \$	FY 2009 \$
INGUIDE	#	21-200-10	21-200-10	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	4,702.770
INGUIDE	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	4,702.770
Guide Type	OG Type	Project Definition	Total	3,615.000	3,802.680	3,955.920	4,114.860	4,296.330	4,520.550	4,702.770

■ Screens have three primary areas:

- Header area
- Input Area
- Output Area

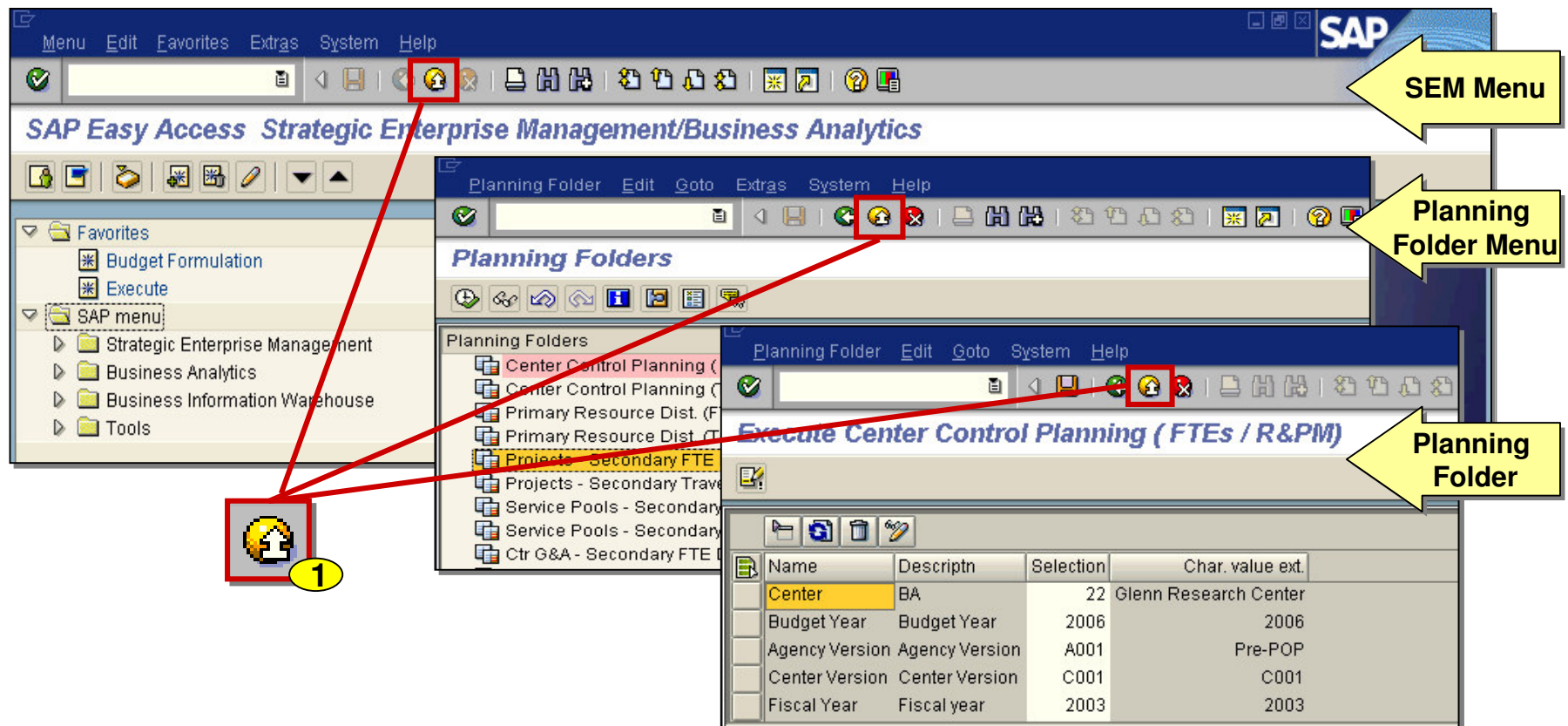
What Are the Menu Buttons?



Menu Buttons

- ① **Checked/OK** – Enters your data
- ② **Save** – Saves your work
- ③ **Back** – Takes you back one screen
- ④ **Exit** – Exits you out of the system
- ⑤ **Cancel** – Cancels your data
- ⑥ **Create New Session** – Opens another session

How Do I Log Out?



The screenshot illustrates the SAP Easy Access interface with three overlapping windows. Red boxes and arrows highlight the 'Exit' button (a house icon) in the top-right corner of each window's menu bar. Yellow callout boxes with arrows point to these buttons, labeled 'SEM Menu', 'Planning Folder Menu', and 'Planning Folder'. A red box with a yellow circle containing the number '1' is placed next to the 'Exit' button in the bottom-most window.

SEM Menu

Planning Folder Menu

Planning Folder

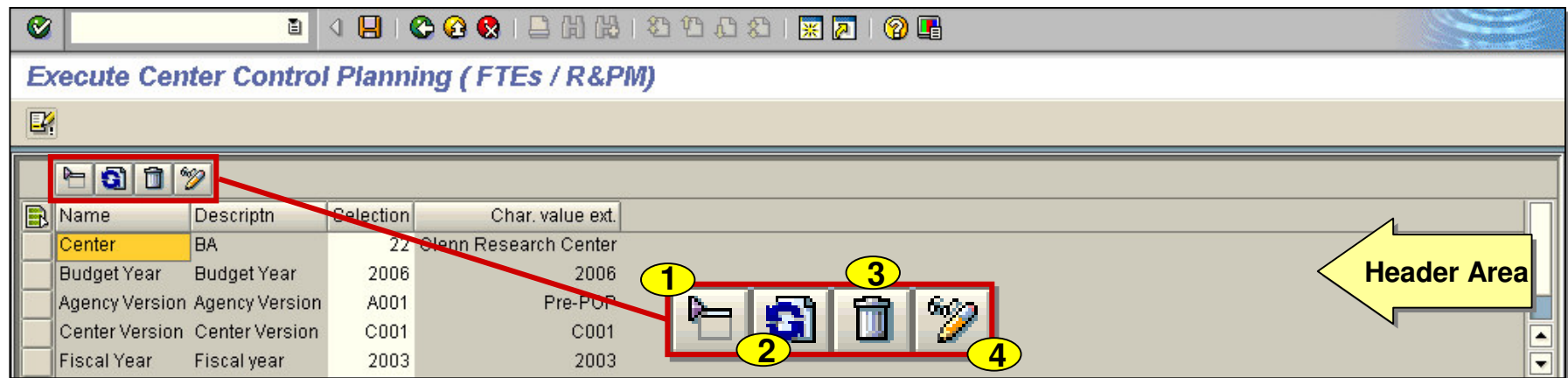
Execute Center Control Planning (FTEs / R&PM)

Name	Descriptn	Selection	Char. value ext.
Center	BA	22	Glenn Research Center
Budget Year	Budget Year	2006	2006
Agency Version	Agency Version	A001	Pre-POP
Center Version	Center Version	C001	C001
Fiscal Year	Fiscal year	2003	2003


Regardless of where you are in the system, to log out:

- 1 Click the **Exit** button.

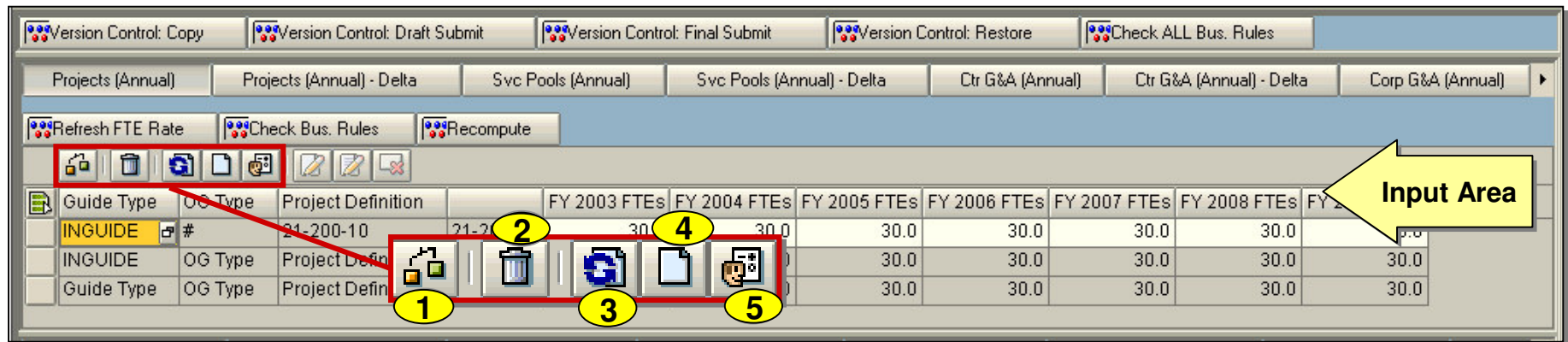
What Are the Header Area Buttons?



Header Menu Buttons

- ① **Hide Variable Values** – Hides the header characteristics leaving the Input and Output Areas.
- ② **Transfer Variables** – Sends the header variables to the database. A user can retrieve data for the corresponding header variables or plan based upon the header data.
- ③ **Delete** – Deletes an entire row of Header Characteristics. This functionality should **NOT** be used. 
- ④ **Display/Change** – Removes ability to edit the Header Characteristics.








What Are the Input Area Buttons?




Input Area Menu Buttons

- ① **Check** – Checks all of the fields in your planning area.
- ② **Delete** – Deletes a row of data.
- ③ **Sort** – Sends data to the database and creates a total by row in the input area.
- ④ **Append Row** – Inserts a blank row in the input area for planning.
- ⑤ **Lead Column Settings** – Allows the user to indicate what lead columns should be totaled and subtotaled. Preferences can also be set to modify the way data is sorted in the Lead Column.

How Do I Add a Row of Data?

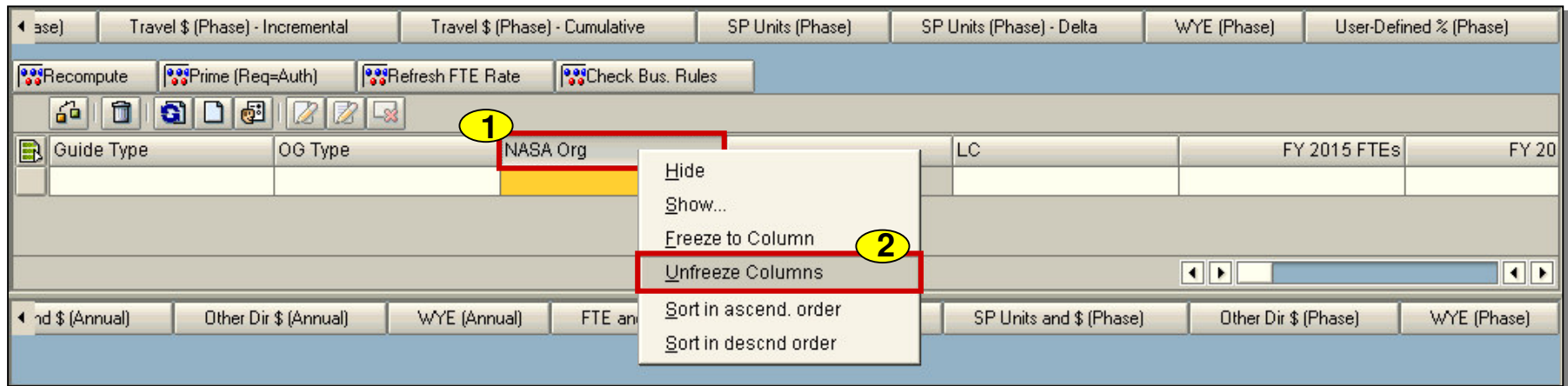
FTE (Annual)	FTE (Annual) - Delta	FTE Rate (Annual)	FTE \$ (Annual)	FTE (Phase)	FTE (Phase) - Delta	FTE Rate (Phase)	FTE \$ (Phase)	F	
<div>Recompute Refresh FTE Rate Check Bus. Rules</div>									
<div><div></div></div>									
Guide Type	OG Type	NASA Org	LC	FY 2003 FTEs	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs	
INGUIDE	#	220410	AEROPROPULSION RESEARCH PROGRAM OFFICE	#	10.0	10.0	15.0	15.0	20.0
INGUIDE	#	220630	OFFICE OF THE CHIEF FINANCIAL OFFICER	#	50.0	50.0	45.0	45.0	40.0
INGUIDE	#	220630	OFC OF SAFETY & ASSURANCE TECHNOLOGIES	#	60.0	60.0	60.0	60.0	60.0
INGUIDE	#	220630	LOGISTICS & TECHNICAL INFORMATION DIV	#	20.0	20.0	20.0	20.0	20.0

FTE (Annual)	FTE (Annual) - Delta	FTE Rate (Annual)	FTE \$(Annual)	FTE (Phase)	FTE (Phase) - Delta	FTE Rate (Phase)	FTE \$(Phase)	F		
<div>Recompute Refresh FTE Rate Check Bus. Rules</div>										
<div><div>📁 🗑️ 🏠 📄 📅 📝 ✎ ✖</div></div>										
	Guide Type	OG Type	NASA Org	LC	FY 2003 FTEs	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs	
	INGUIDE	OG Type	NASA Org	Total	LC	945.0	975.0	985.0	1,005.0	1,025.0
	Guide Type	OG Type	NASA Org	Total	LC	945.0	975.0	985.0	1,005.0	1,025.0

- 1 Click the **Append Row** button. A blank row will be added. If data already exists in the input area, the row will be inserted at the end of the data.
- 2 Enter data into the row.



How Do I Scroll Right To See/Enter My Data?

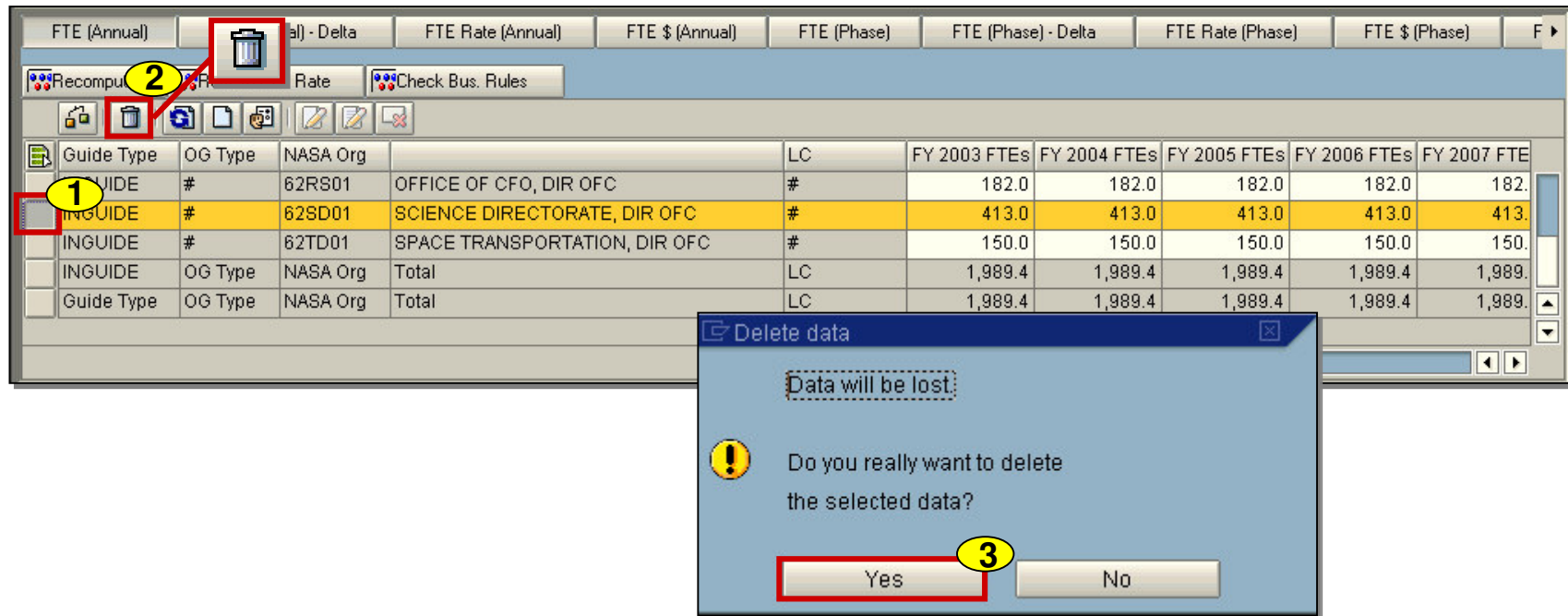


- 1 Right-click on any column header.
- 2 Select Unfreeze Columns.



NOTE: Upon entering a row, you need to unfreeze columns. This will allow you to scroll through data to the right of the visible screen.

How Do I Delete a Row of Data?



The screenshot shows the i fm PROGRAM interface with a table of data. The table has columns: Guide Type, OG Type, NASA Org, LC, FY 2003 FTEs, FY 2004 FTEs, FY 2005 FTEs, FY 2006 FTEs, and FY 2007 FTEs. The second row is highlighted in yellow. A red box labeled '1' is around the empty box to the left of the second row. A red box labeled '2' is around the 'Delete Row' button in the toolbar. A red box labeled '3' is around the 'Yes' button in the 'Delete data' dialog box.

Guide Type	OG Type	NASA Org	LC	FY 2003 FTEs	FY 2004 FTEs	FY 2005 FTEs	FY 2006 FTEs	FY 2007 FTEs
INGUIDE	#	62RS01	OFFICE OF CFO, DIR OFC	182.0	182.0	182.0	182.0	182.0
INGUIDE	#	62SD01	SCIENCE DIRECTORATE, DIR OFC	413.0	413.0	413.0	413.0	413.0
INGUIDE	#	62TD01	SPACE TRANSPORTATION, DIR OFC	150.0	150.0	150.0	150.0	150.0
INGUIDE	OG Type	NASA Org	Total	1,989.4	1,989.4	1,989.4	1,989.4	1,989.4
Guide Type	OG Type	NASA Org	Total	1,989.4	1,989.4	1,989.4	1,989.4	1,989.4

Delete data

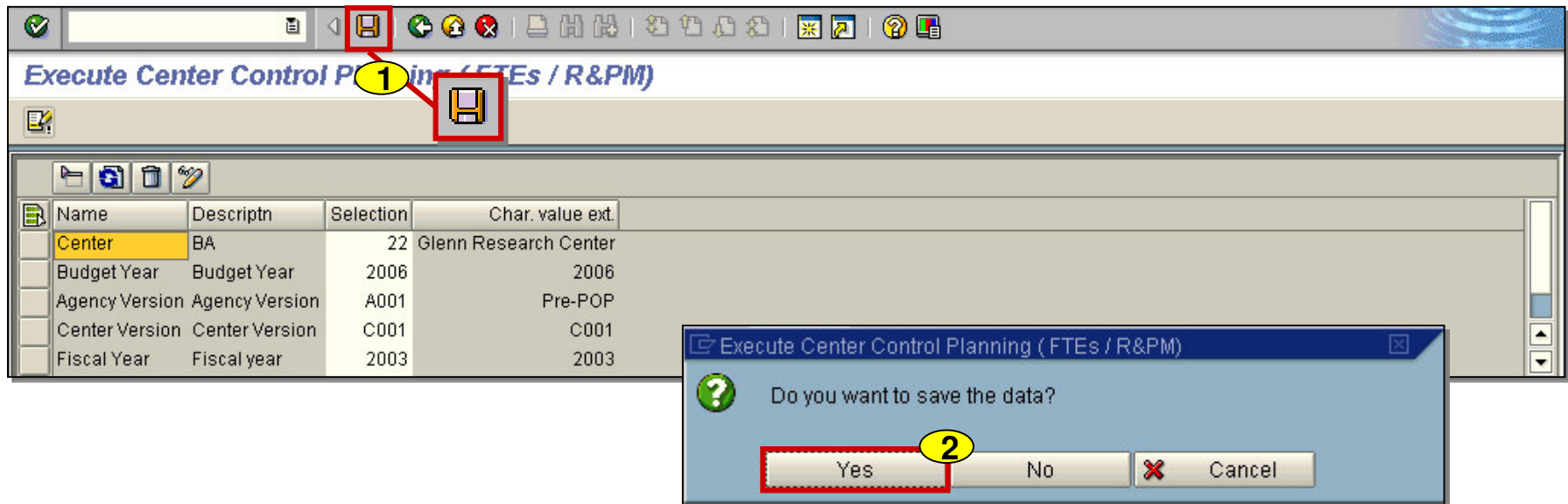
Data will be lost:

Do you really want to delete the selected data?

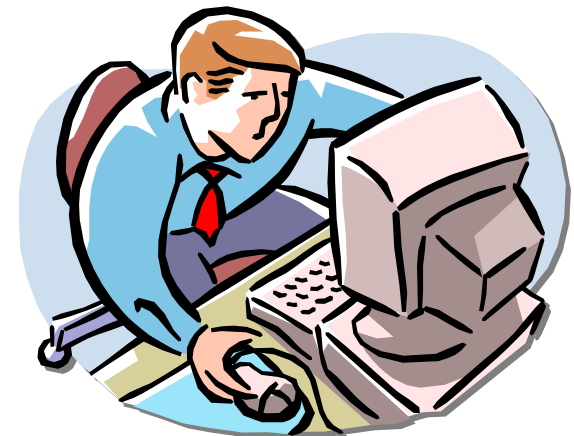
Yes No

- 1 Highlight the row of data by clicking the **empty box** to the left of the row.
- 2 Click the **Delete Row** button. A message box will confirm that you want to delete the data.
- 3 Click the **Yes** button.

How Do I Save Data?



- 1 Click the **Save** button. A message box will confirm that you want to save the data.
- 2 Click the **Yes** button.





How Do I Obtain a Full List of Values in a Dropdown Box?

Value Help for InfoObjectYORG (personal value list)

Controlling area NASA

NASA Org	Short Description	Medium Description	BA	Company Co	Srcce Sys.	Object cur	Profit cen	Person responsible
51150	Office of CFO	Office of the Chief Financial Officer	51	NASA	SAPBW1200	USD		N. Abell
51150	Office of CFO	Office of the Chief Financial Officer	51	NASA	SAPBW1200	USD		N. Abell
220600	ACQUISITION	OFFICE OF ACQUISITION	22	NASA	SAPT01311	USD		D. B. Walker
220600	ACQUISITION	OFFICE OF ACQUISITION	22	NASA	SAPT01311	USD		D. B. Walker
225500	INSTRUMENT & CONTROL	INSTRUMENTATION AND CONTROLS DIVISION	22	NASA	SAPT01311	USD		D. B. Walker
225500	INSTRUMENT & CONTROL	INSTRUMENTATION AND CONTROLS DIVISION	22	NASA	SAPT01311	USD		D. B. Walker
227100	COMPUTER SERVICES	COMPUTER SERVICES DIVISION	22	NASA	SAPT01311	USD		D. B. Walker
10AAA00	OFFICE OF THE ADMIN.	OFFICE OF THE ADMINISTRATOR	10	NASA	SAPT01831	USD		Timothy Kelly
2201SR0026	SRF-FRAC TOUGHNESS	SRF-T						

Value Help for InfoObjectYORG

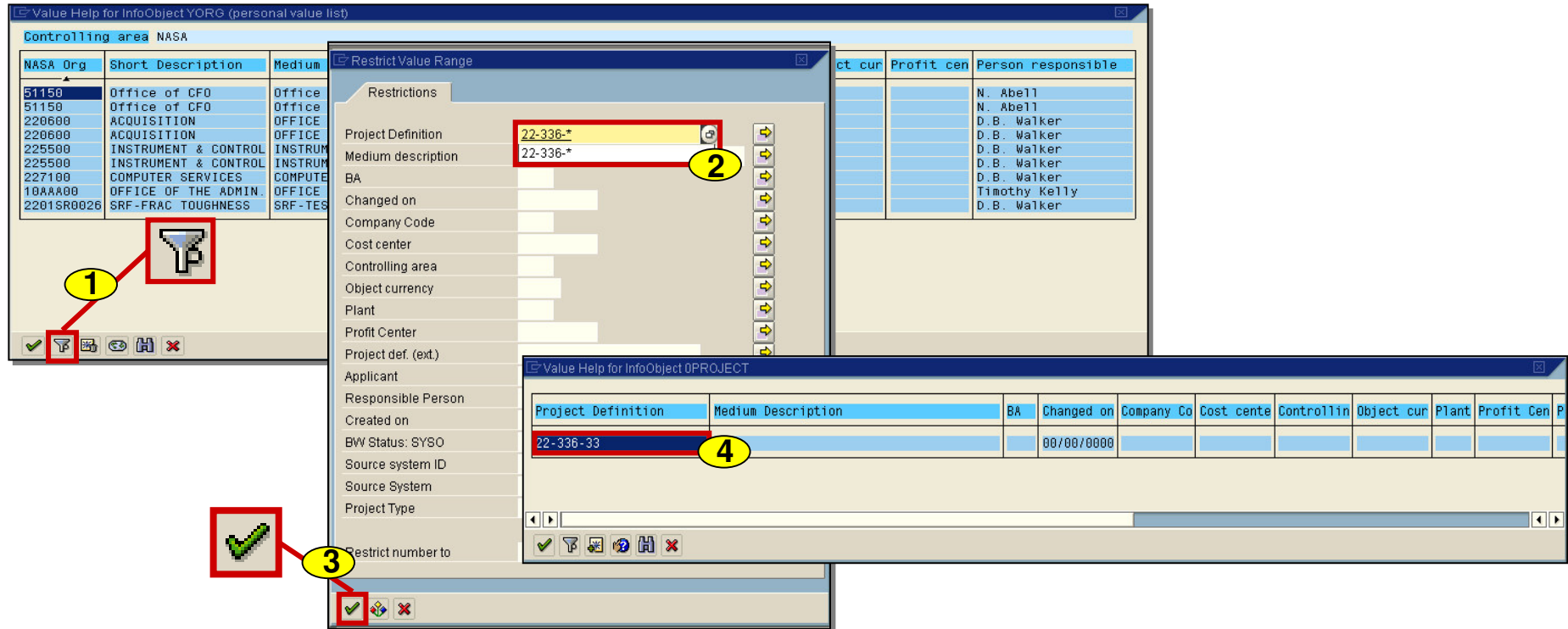
Controlling area NASA

NASA Org	Short Description	Medium Description	BA	Company Co	Srcce Sys.	Object cur	Profit cen	Person responsible
21	Ames	DELETE THIS COST CENTER	21	NASA	SAPBW1200	USD		C. Smith
62	DELETE	Structural Dynamics & Load Group	62	NASA	SAPBW1200	USD		J. Bunty
2202	OFFICE OF CFO	OFFICE OF CFO	22	NASA				
2205	SAFETY & ASSURANCE	SAFETY & ASSURANCE	22	NASA				
2206	OFFICE ACQUISITION	OFFICE ACQUISITION	22	NASA				
51100	Director	Office of the Director	51	NASA	SAPBW1200	USD		A. Diaz
51110	Human Resources	Office of Human Resources	51	NASA	SAPBW1200	USD		A. Hubbard
51112	Workforce Planning	Workforce Planning Office	51	NASA	SAPBW1200	USD		D. Parsons
51113	HR Resources Oper	Human Resources Development Office	51	NASA	SAPBW1200	USD		S. Buffalano
51114	Human Resources Dev.	Human Resources Development Office	51	NASA	SAPBW1200	USD		S. Johnson
51120	Equal Oppt. Prog	Equal Opportunity Program Office	51	NASA	SAPBW1200	USD		D. Menchan
51130	Public Affairs	Office of Public Affairs	51	NASA	SAPBW1200	USD		J. Ruff
51140	Chief Counsel	Office of Chief Counsel	51	NASA	SAPBW1200	USD		L. Watson
51150	Office of CFO	Office of the Chief Financial Officer	51	NASA	SAPBW1200	USD		N. Abell
51151	Reg. Finance Office	Regional Finance Office	51	NASA	SAPBW1200	USD		P. Gal-Edd
51153	Program Anal. Office	Program Analysis Office	51	NASA	SAPBW1200	USD		J. Baker
51155	Cost and Commercial	Cost and Commercial Accounts Department	51	NASA	SAPBW1200	USD		S. Brown
51156	IFMP Implementation	IFMP Implementation and Operations Off.	51	NASA	SAPBW1200	USD		J. Sprunk
51157	General Accounting	General Accounting Department	51	NASA	SAPBW1200	USD		M. Mitchell
51159	Financial Services	Financial Services Department	51	NASA	SAPBW1200	USD		G. Flemming
51160	University Programs	Office of University Programs	51	NASA	SAPBW1200	USD		G. Soffen
51190	Inspector General	NASA Office of Inspector General	51	NASA	SAPBW1200	USD		K. Carson
51200	Management Operation	Management Operations Directorate	51	NASA	SAPBW1200	USD		A. McNally
51201	Institutional Supp.	Institutional Support Office	51	NASA	SAPBW1200	USD		T. Paprocki
51205	Safety, Environ.	Safety, Environmental and Security Off.	51	NASA	SAPBW1200	USD		P. Sinha
51211	Center ADP Procure.	Center ADP Procurement Office	51	NASA	SAPBW1200	USD		P. Logan
51212	Management Op. Proc.	Management Operations Procurement Off.	51	NASA	SAPBW1200	USD		C. Tart
51213	Procurement Supp.	Procurement Support Office	51	NASA	SAPBW1200	USD		R. Acevedo
51215	AETD/STAAC Direct.	AETD/STAAC Directorates	51	NASA	SAPBW1200	USD		E. Austin
51216	Space Sciences Dir.	Space Sciences Directorate	51	NASA	SAPBW1200	USD		L. Giraldi
51218	Wallons Procurement	Wallons Procurement Office	51	NASA	SAPBW1200	USD		R. Panliaro

1

- 1 In the dropdown box, click the **All Values** button. This will expand the list of available information.

How Do I Filter Information In a Dropdown Box?



The screenshot illustrates the steps to filter information in a dropdown box within SAP. It shows two windows: 'Value Help for InfoObject YORG (personal value list)' and 'Value Help for InfoObject 0PROJECT'.

Step 1: In the 'Value Help for InfoObject YORG' window, the 'Filter' button (funnel icon) is highlighted with a red box and a yellow circle labeled '1'.

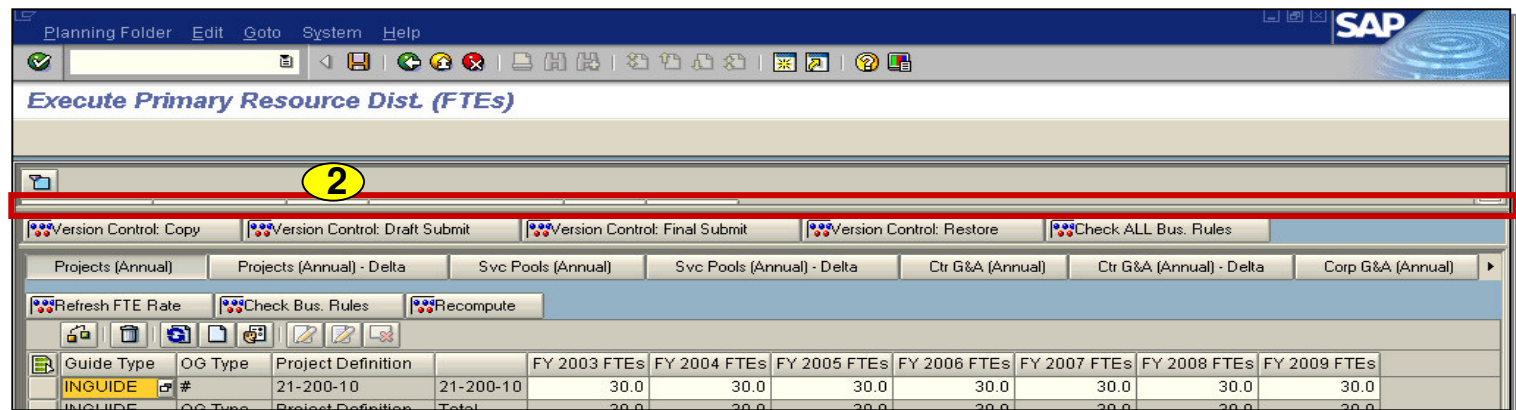
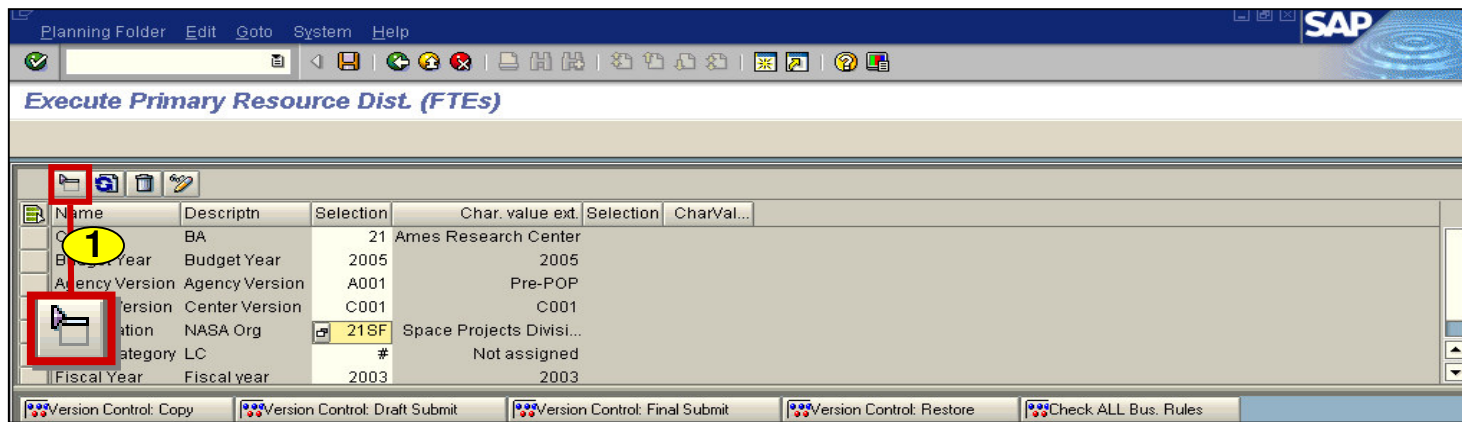
Step 2: The 'Restrict Value Range' dialog box is open, showing the 'Restrictions' tab. The 'Project Definition' and 'Medium description' fields are both set to '22-336-*'. A red box and a yellow circle labeled '2' highlight the 'Medium description' field.

Step 3: The 'Enter' button (checkmark icon) is highlighted with a red box and a yellow circle labeled '3'.

Step 4: The 'Value Help for InfoObject 0PROJECT' window shows the filtered results. The 'Project Definition' field is set to '22-336-33', which is highlighted with a red box and a yellow circle labeled '4'.

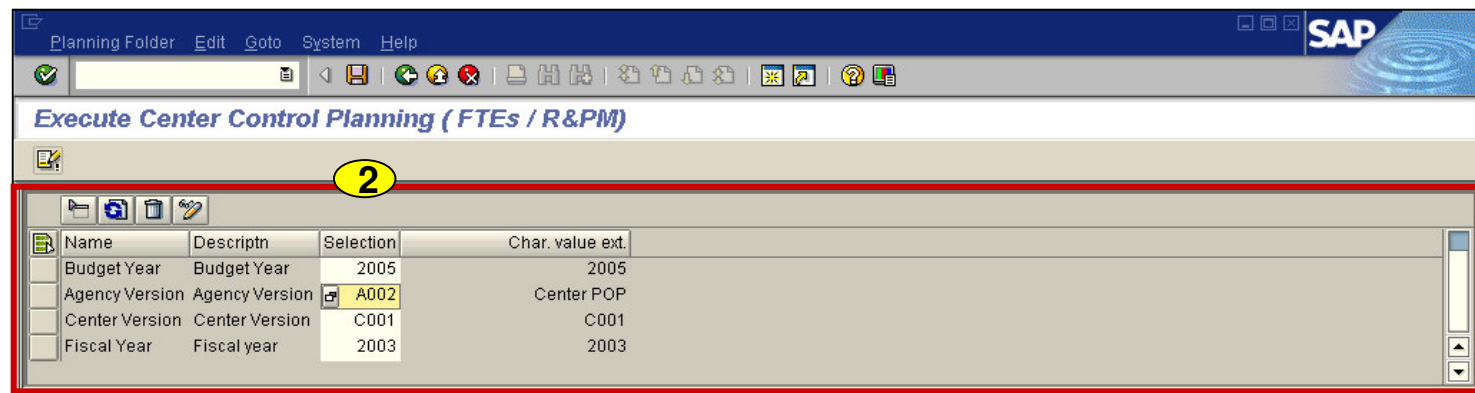
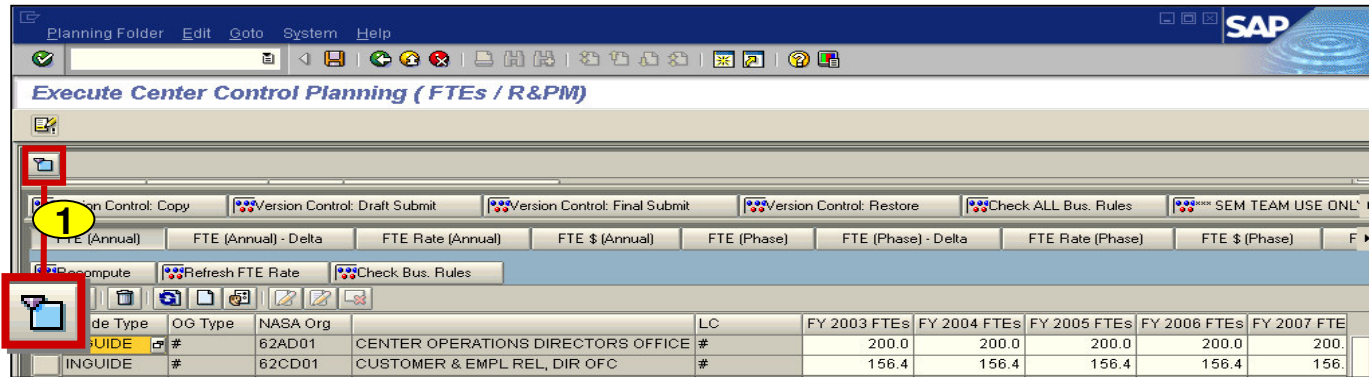
- ① In the dropdown box, click the **Filter** button. A message box will prompt you to enter your filter criteria.
- ② Enter your filter criteria.
- ③ Click the **Enter** button.
- ④ The dropdown box will display the data that meets the criteria you entered.

How Do I Hide the Header?



- ① Click the **Hide Variable Values** button.
- ② The Header will be hidden, leaving only the Input and Output Areas.

How Do I Display the Header?



- 1 Click the ***Display Variable Values*** button.
- 2 The Header will appear, along with the Input and Output Areas.